

The Job Training Demonstration Project

A Community-Based Initiative of COPS/Metro Alliance

PHASE I

The Conceptual Design

MARCH 1992

OPERATIONS

DESIGN

PLANNING

Funded by



THE JOB TRAINING DEMONSTRATION PROJECT
A Community-Based Initiative of COPS/Metro Alliance

PHASE 1: THE CONCEPTUAL DESIGN

as adopted by

THE POLICY STEERING COMMITTEE

February 24, 1992

Prepared by

**Robert McPherson
Brian Deaton**

Under Contract to

The Texas Employment Commission

Support Provided by

**City of San Antonio
Department of Community Initiatives**

March 13, 1992

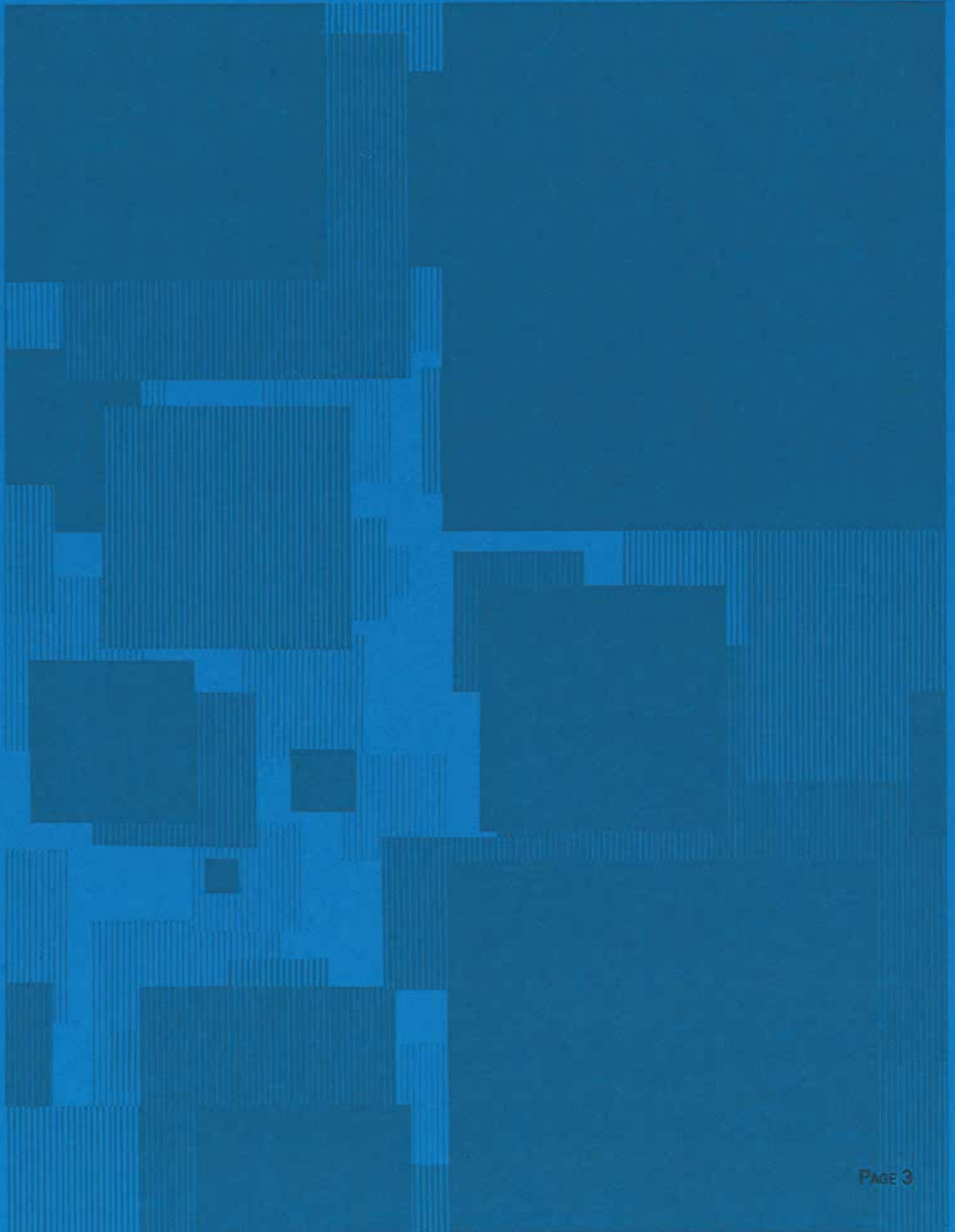
TABLE OF CONTENTS

<u>Section</u>	<u>Page</u>
1. PROJECT FUNDING	3
2. MANAGEMENT STRUCTURE FOR SYSTEMS DESIGN	5
3. MAJOR PROJECT PHASES	7
4. PROJECT DESIGN OVERVIEW	9
5. PARTICIPANT FLOW STRUCTURE	20
6. PROJECT COMPONENT DESCRIPTIONS	32
7. PROJECT ORGANIZATION STRUCTURE	69
8. OPERATIONAL PLANNING DECISIONS/ACTIONS	71

Appendices

- A. Executive Director Job Description
- B. Membership Lists

Project Funding

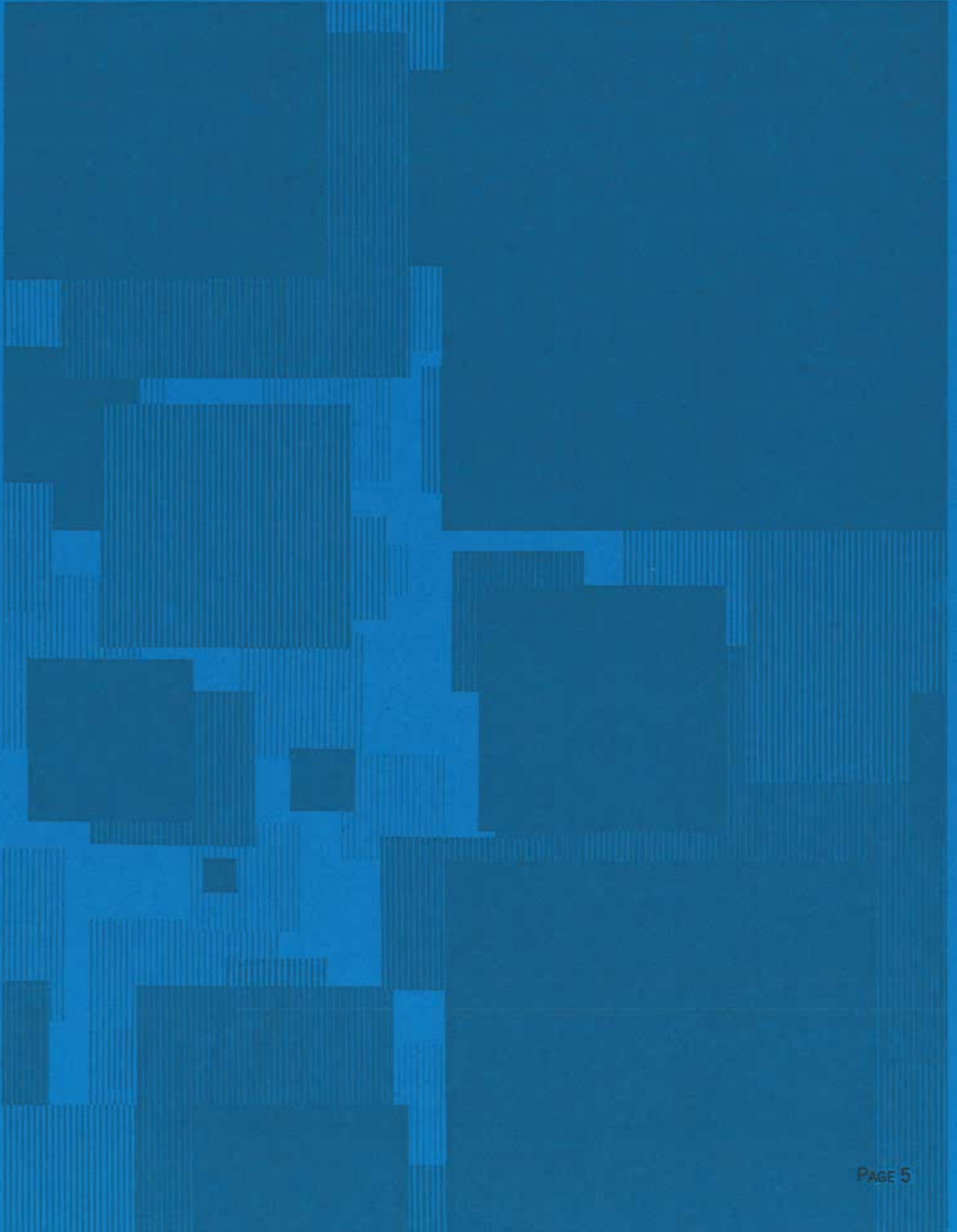


PROJECT FUNDING SUMMARY

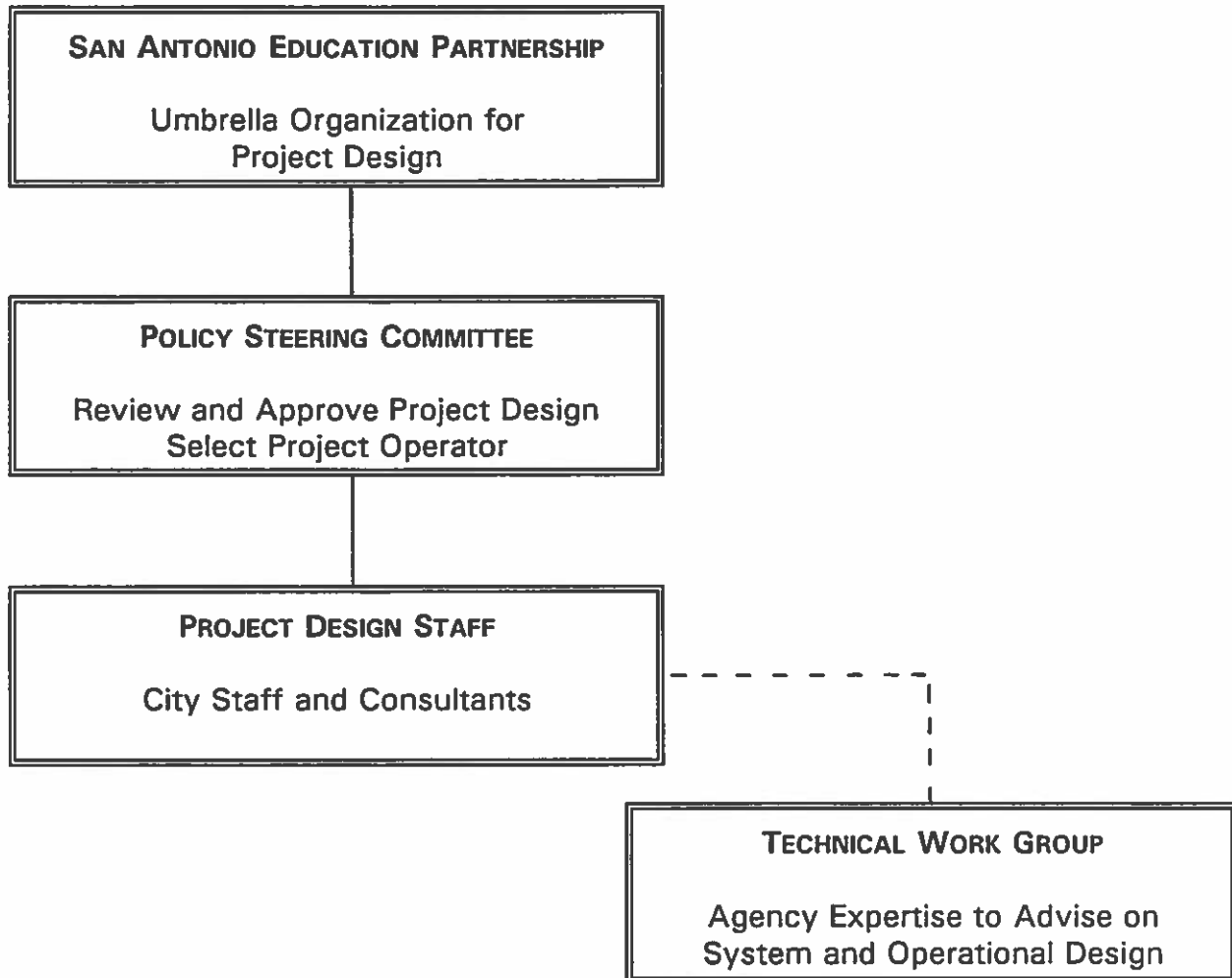
(Actual and Projected: 7/1/92 - 6/30/94)

<u>Type/Source</u>	<u>Amount</u>
City General Fund	\$2,000,000
Texas Employment Commission: Wagner-Peyser 7-B	\$2,500,000
San Antonio Works, City of San Antonio: JTPA II-A	<u>\$2,000,000</u>
TOTAL	<u>\$6,500,000</u>

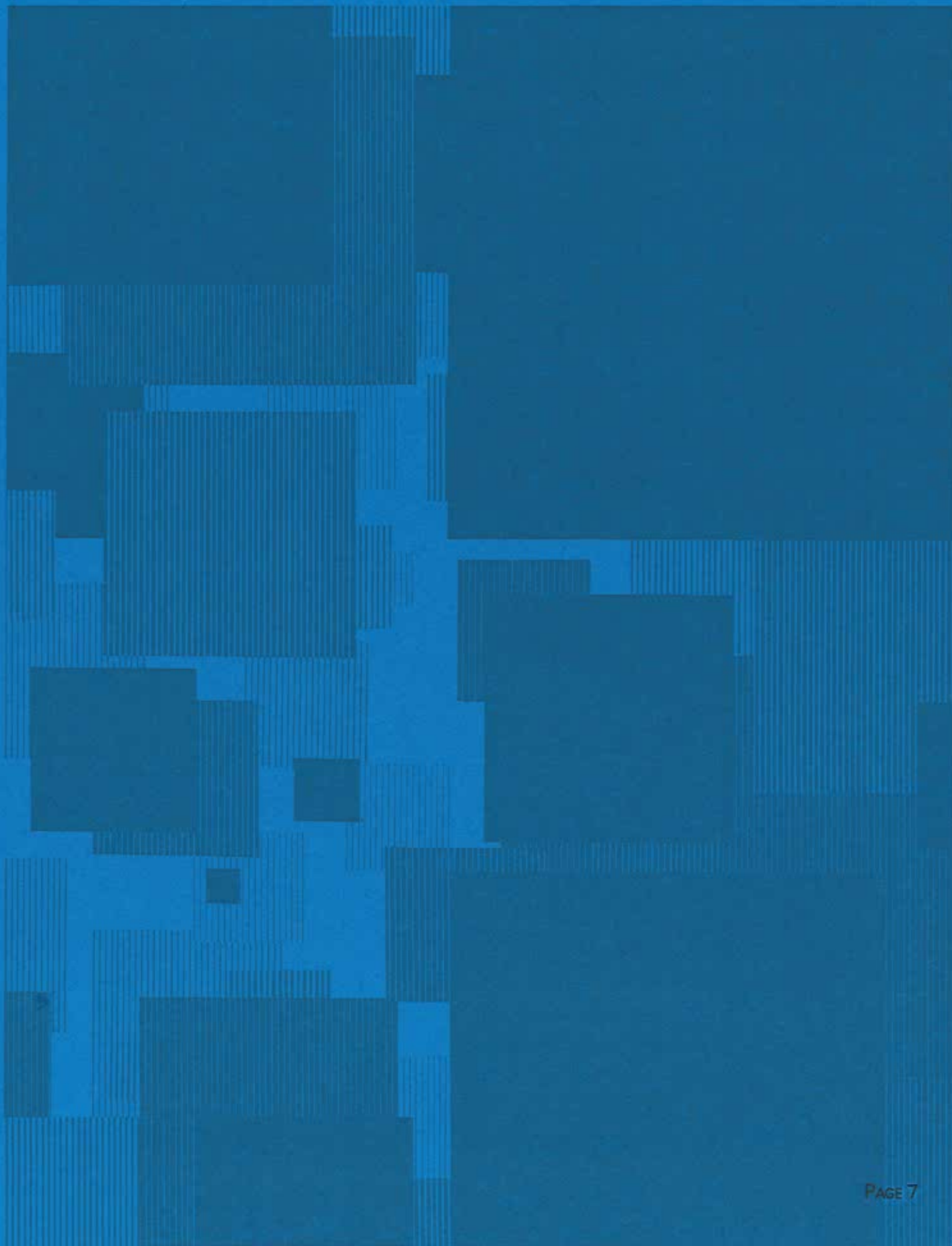
Management Structure



MANAGEMENT STRUCTURE FOR SYSTEMS DESIGN



Major Phases



MAJOR PROJECT PHASES

I. CONCEPTUAL DESIGN

January 15 - February 28, 1992

- ▶ Program Services and Activities
- ▶ Supporting Management Systems

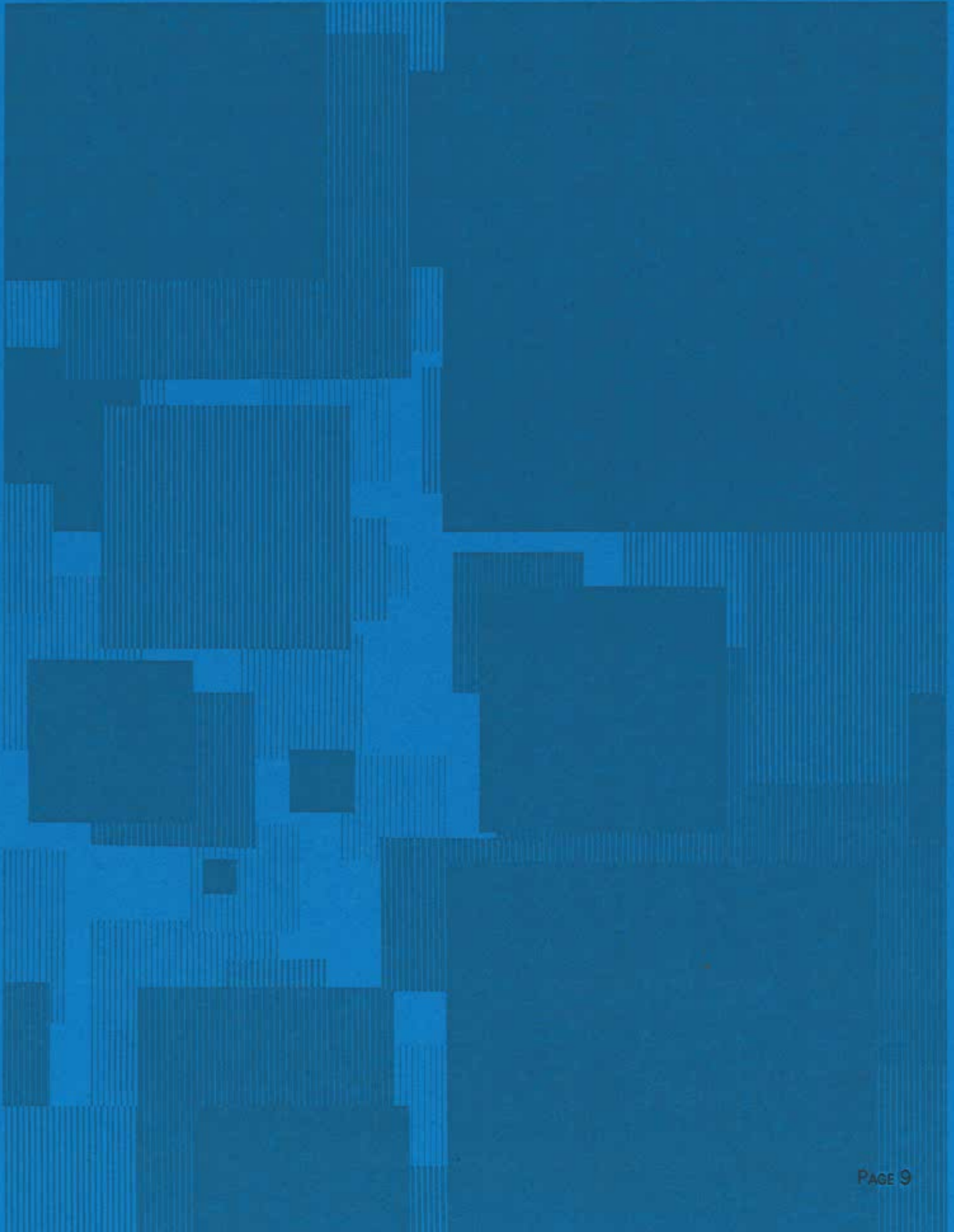
II. OPERATIONAL PLANNING

March 1 - June 30, 1992

III. PROGRAM IMPLEMENTATION

July 1, 1992 - June 30, 1994

Project Overview



PROBLEM STATEMENT

Many of San Antonio's young adults are well along career paths leading to college degrees and the professions. A growing number however, leave secondary school and enter the labor market without the basic education and technical skills required to earn a good living. Unless they get help, they are relegated to jobs paying low wages and offering few benefits. These individuals often live in poverty and depend on various government programs for their survival. This pattern is likely to be repeated from one generation to the next.

At the same time, a number of San Antonio employers are experiencing difficulty finding skilled workers to fill persistent shortages in relatively high-wage occupations. For the most part, these are jobs in expanding industries which offer good fringe benefits and opportunities for advancement.

If this mismatch of supply and demand continues, the San Antonio economy will pay a high price in terms of lost productivity, income and future employment opportunities. Long-term investments in general education and technical skills are essential to filling current job openings and making greater numbers of San Antonio residents more productive and better prepared to move into new jobs as the economic landscape changes.

Such investments in developing the city's human resources will yield major returns: local businesses will be more competitive in world markets; San Antonio will attract higher performance firms paying better wages; and residents of the city will enjoy a higher standard of living. In summary, San Antonio's economic future depends on making these kinds of investments.

MISSION STATEMENT

This project is designed to demonstrate that substantial long-term investments in skills training directly linked to employers will yield high returns in terms of:

- * Access to high quality and better paying jobs for a number of young adults who would otherwise not have had the opportunity;
- * A better skilled and more productive workforce to enhance the economic growth and vitality of the San Antonio area;
- * Greater self-sufficiency and social stability for those who participate;
- * An innovative approach to providing individualized training that is more appropriate both to employers' needs and to the individuals receiving the training.

UNDERLYING ASSUMPTIONS

- * There are current shortages of skilled labor in a number of occupational areas in the San Antonio labor market. These occupations represent quality job opportunities for local residents who meet the education and skill requirements of the jobs.
- * Employers experiencing these labor shortages do not have an adequate supply of qualified applicants to fill current openings. When local employers can count on having a pool of qualified applicants, they will both fill existing jobs and develop additional job opportunities in related occupations.
- * The current labor shortages are not due to a lack of capacity in local training institutions. Training programs in existing educational institutions can be adapted to provide the level of training excellence envisioned under this demonstration.
- * San Antonio residents will make investments in long-term education and training programs if there is a high probability of good-paying jobs at the end of the training and if they have the financial means of sustain themselves during training.
- * The inability of individuals to access quality job opportunities in San Antonio stems from their lack of education and skill training, not from ignorance of available opportunities or low motivation.

PROJECT GOALS

- * To demonstrate that higher levels of investment yield higher returns, measured in both economic and social terms.
- * To demonstrate that an employer-driven delivery system will increase the number of quality job opportunities available for program participants.
- * To demonstrate that a truly excellent job training program will provide individuals with the skills required for long-term employment and higher incomes.
- * To demonstrate that an individual approach can be more cost-effective than traditional, institution-based approaches to service delivery.

DISTINGUISHING FEATURES

- * A jobs-driven program where the education and training mix is determined by the requirements for employment in shortage occupations as well as the education and skill levels of enrollees.
- * An industry/occupation-based education and training program where the standards and performance expectations are determined by prospective employers before the training curriculum is developed.
- * A clear focus on quality jobs in expanding industries and occupations -- high wage jobs with health care benefits, good working conditions and opportunities for advancement.
- * An unusually high level of community commitment and support for both the program and individual enrollees.
- * A client-centered program that demands individual responsibility and self-sufficiency.
- * A strong commitment to excellence in providing the basic education, long-term skills development and support services necessary to prepare enrollees for jobs in the identified occupations.
- * A departure from the more traditional "means-tested" employment and training programs, which are viewed as extensions of the welfare system and whose enrollees are automatically stigmatized by their participation.
- * An integrated program delivery system that is flexible and responsive enough to meet the individual needs of the clients. key elements include:
 - ▶ community-based pre-screening of all potential applicants;
 - ▶ common intake and eligibility determination;
 - ▶ in-depth assessment of client needs independent of the existing mix of education, job training and support services in the community;
 - ▶ referrals based on the developmental and support service needs reflected in clients' employability development plans; and
 - ▶ an approach to case management that gives clients a single counselor and case manager throughout their participation in the program.

DISTINGUISHING FEATURES (cont.)

- * A stand-alone demonstration project independent of the City of San Antonio's current JTPA program.
- * An independent evaluation to determine the cost-effectiveness of the demonstration.

POPULATION TO BE SERVED

Young adults with a high school diploma or GED who have two of the following barriers to employment:

- ▶ economically disadvantaged
- ▶ reading or math skills below the 9th grade level
- ▶ limited English speaking ability
- ▶ no prior work history within the last two years in which they remained on the same job for longer than six months
- ▶ no prior work history or vocational training in any of the target occupations
- ▶ teen parent
- ▶ handicapped
- ▶ offender
- ▶ displaced homemaker

TARGET GROUPS FOR SPECIAL CONSIDERATION WITHIN THE ELIGIBLE POPULATION

- * Applicants who have a working life expectancy of at least twenty-five years
- * Parents with dependent children less than seven years of age [NOTE: Only one parent per household will be allowed to participate.]

SUCCESS MEASURES

- * At least 85 percent of those enrolled will successfully complete occupational skills training for employment in their chosen fields.
- * At least 95 percent of those who successfully complete occupational training will find full-time jobs.
- * At least 90 percent of the successful completers will work continuously and still be employed full-time 13 weeks after placement, at an average annualized wage of \$16,640.
- * The ratio of aggregate annualized earnings to total program expenditures will be at least 1.70 to 1.
- * The number of participating employers and targeted occupations will increase during the project.
- * The demographics (age, sex, race/ethnicity) of those who complete occupational training and find employment will be consistent with the characteristics of those who enroll.

PROJECT COMPONENTS AND ELEMENTS

I. Job Development

- * Identify and target shortage occupations for training and placement
- * Identify and recruit employers for participation in the project
- * Develop job performance standards and core competencies for each occupation
- * Review/develop and certify curriculum and training providers

II. Participant Intake

- * Outreach and recruitment of potential participants
- * Pre-screening of applicants to verify their interest in the project and commitment and ability to meet the requirements for successful participation
- * Initial orientation to the program and its opportunities and requirements
- * Program application and determination of eligibility for the project and other available services and programs
- * Referral, as appropriate, to the other services and programs

III. Employability Assessment and Planning

- * Group orientation to program
- * Individual career/occupation exploration
- * Standardized testing of skills, interest, and aptitude
- * Identification of individual goals, interests and circumstances
- * Employability development planning
- * Program enrollment or referral

PROJECT COMPONENTS AND ELEMENTS (cont.)

IV. Participant Maintenance

- * Arrange for other available services for which participant is eligible
- * Provide income support while awaiting enrollment in occupational training
- * Provide income support during occupational training

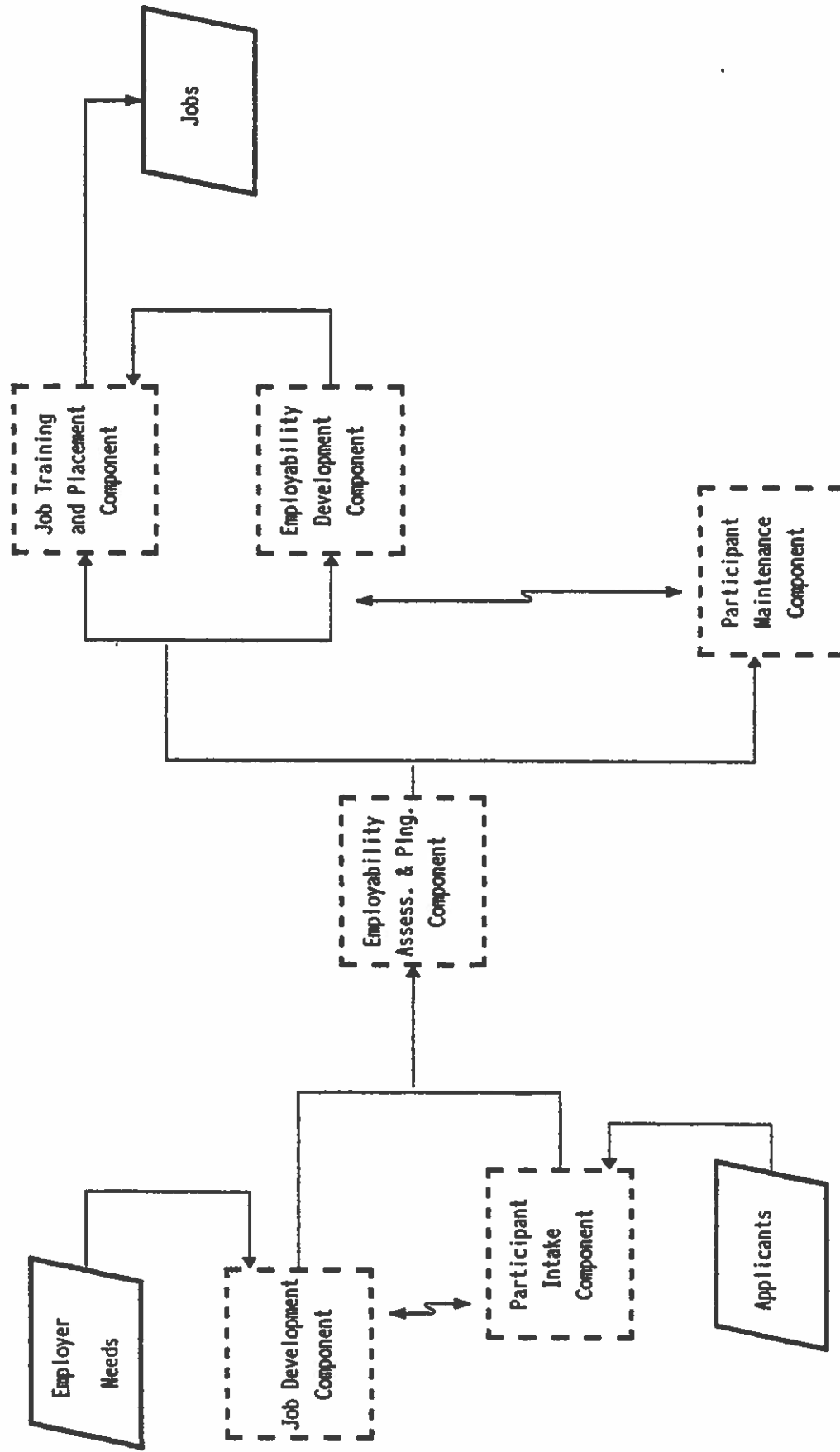
V. Employability Development

- * Basic skills remediation
- * Workplace skills training
- * Group counseling
- * Individualized counseling

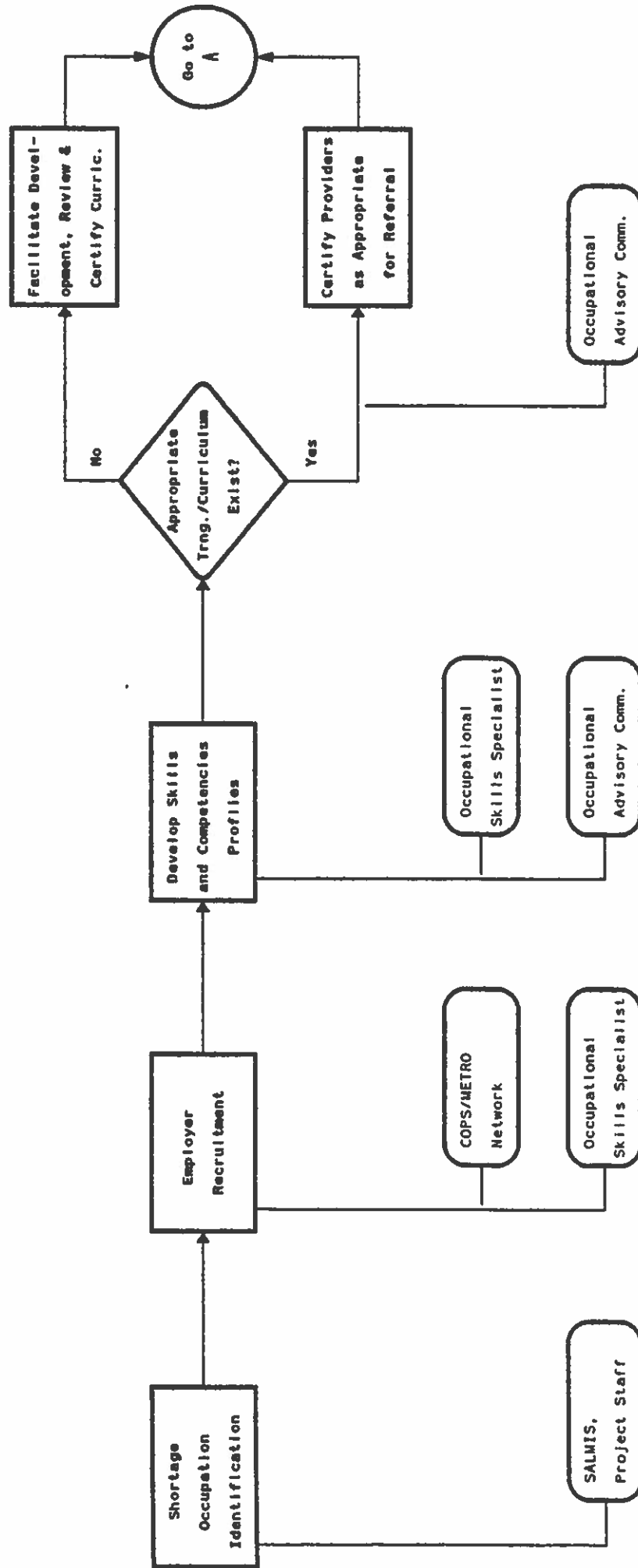
VI. Job Training and Placement

- * Occupational skills training
- * Employer contact and interviewing
- * Job placements
- * Post-placement transitional assistance

The Project System

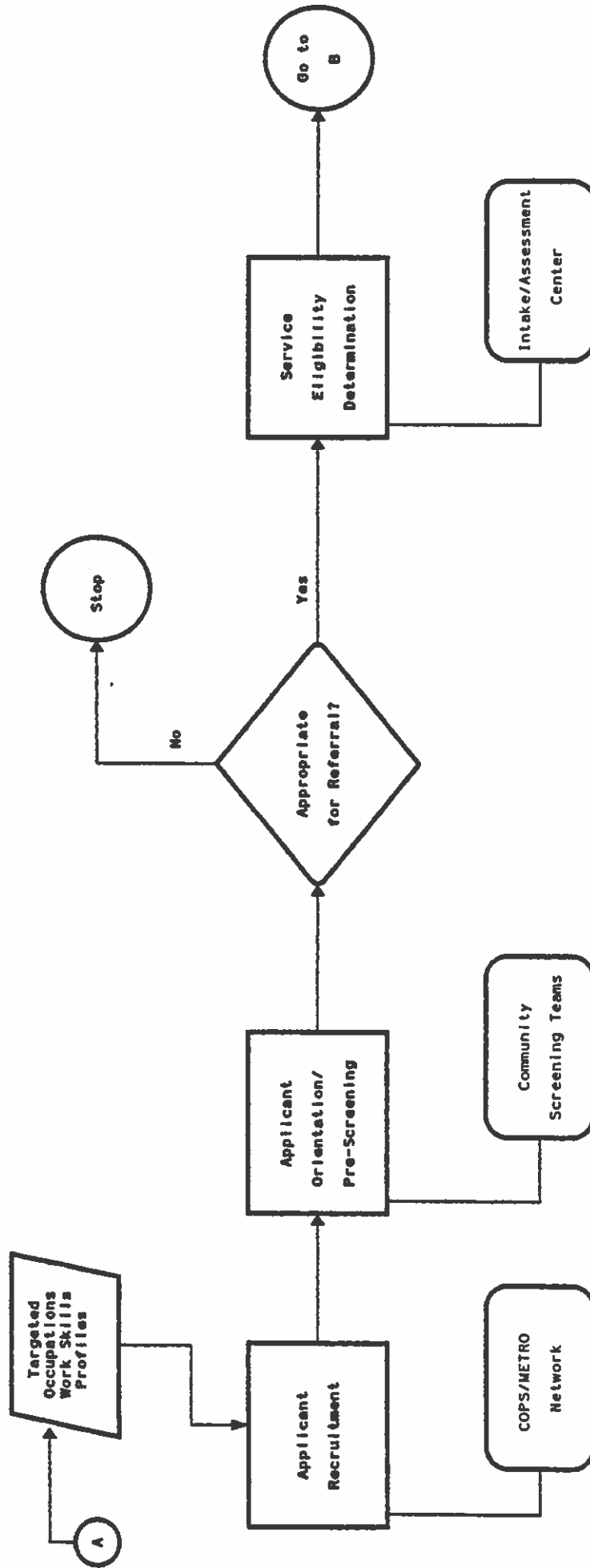


Job Development Component



Identify occupations with existing/emerging shortages and which satisfy compensation and benefits criteria.	Identify employers with shortages. Develop employer interest and commitment to participating in project.	Identify entry-level hiring requirements. Develop testing requirements for screening and competency attainment.	In each targeted occupation, ensure the availability of a curriculum that addresses the core skills, competencies and job performance requirements.
		Develop job profiles for recruitment and career decision-making.	

Participant Intake Component



Control applicant load in relation to program capacity.

Targeted recruitment in relation to target group criteria.

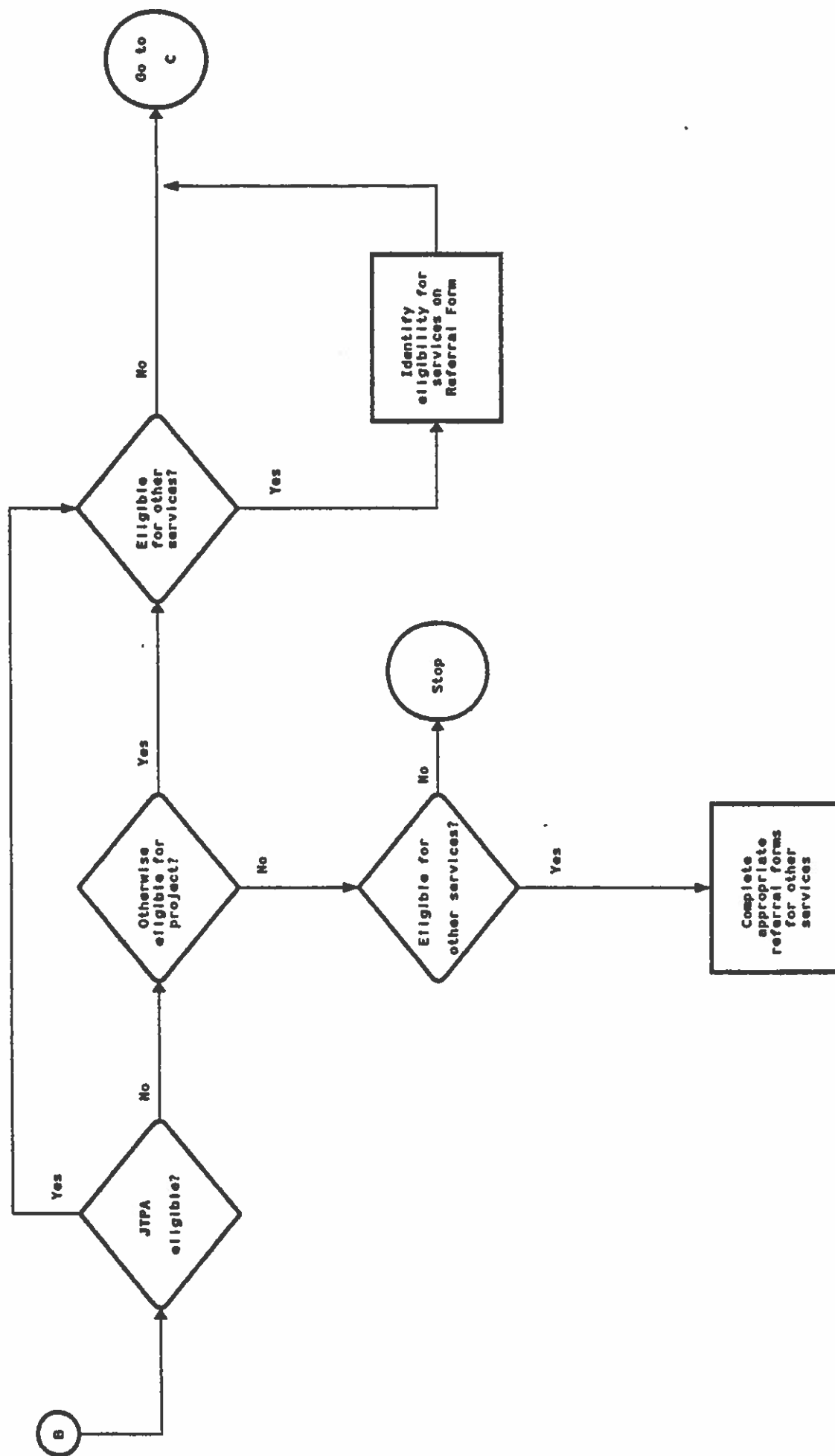
Screen for commitment and connectedness to community.

Establish commitment of community to applicant's success and vice-versa.

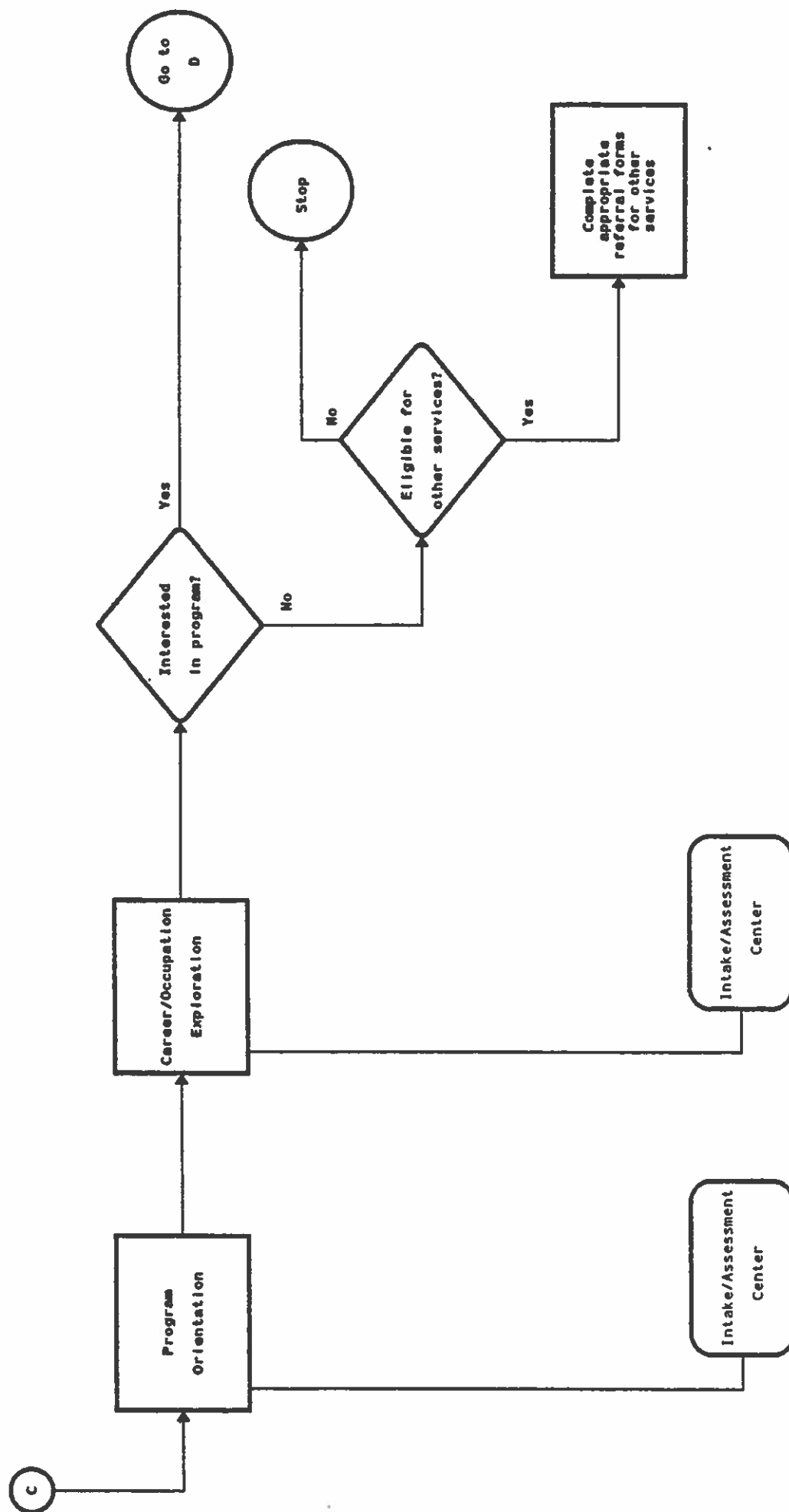
Provide applicant with information on program structure, eligibility and requirements.

Establish eligibility for full range of available services.

Participant Intake Component - 2



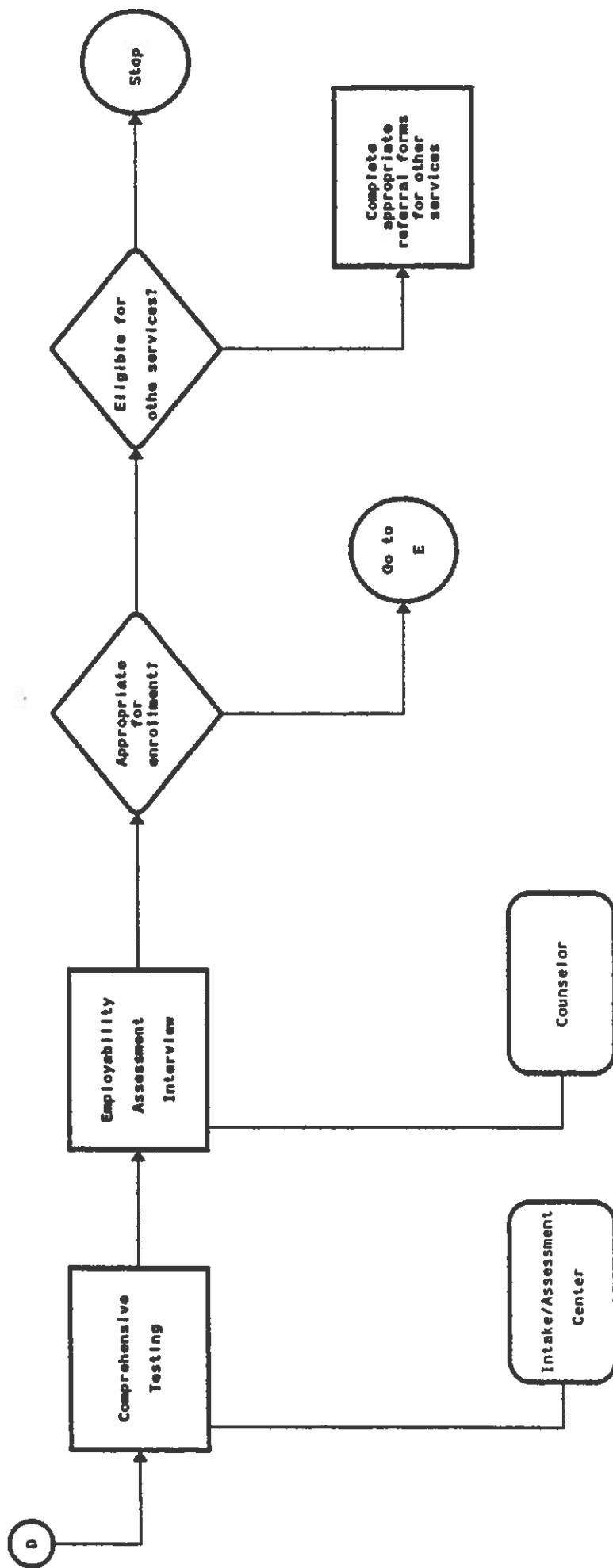
Employability Assessment & Planning Component



Develop applicant understanding of structure of program and of their responsibilities, rights and benefits.

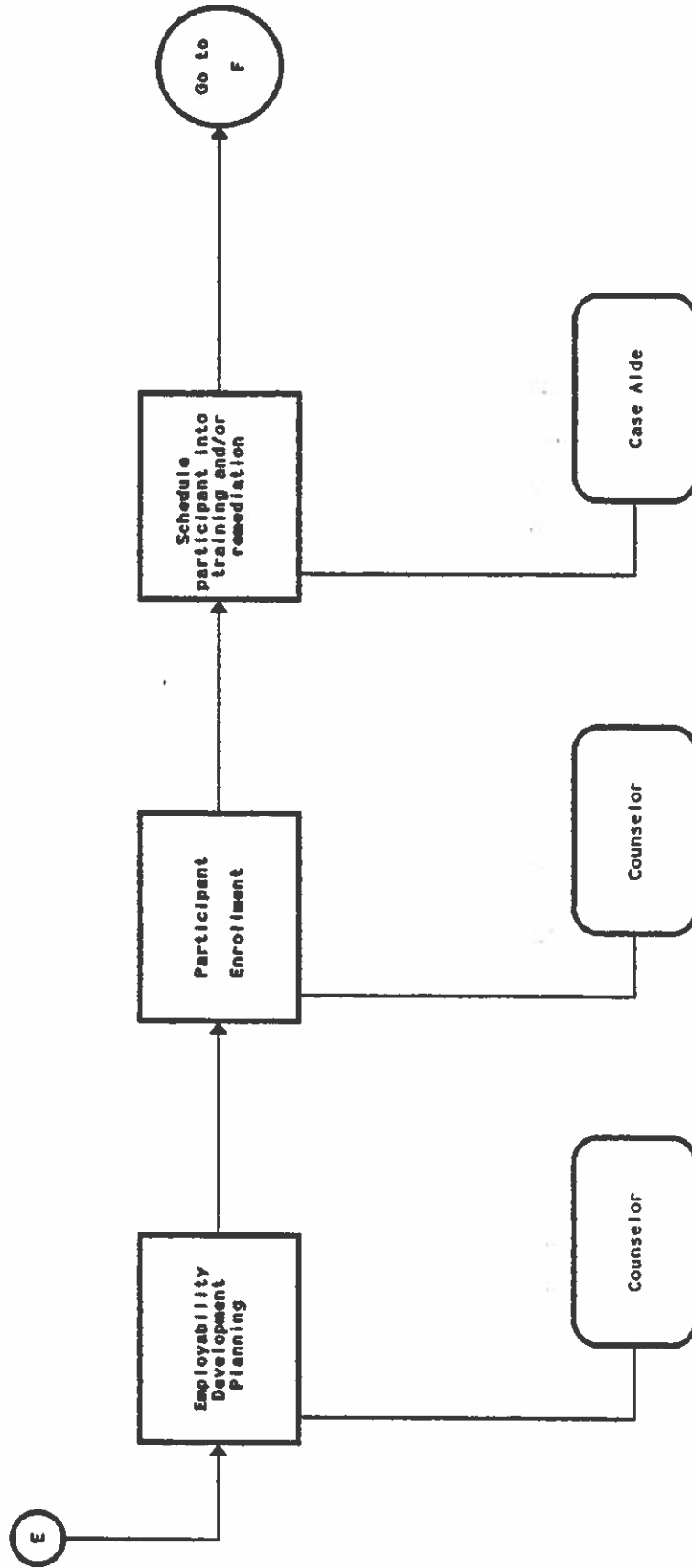
Develop applicant understanding of working conditions, job performance requirements, and compensation for occupations in which training is available.

Employability Assessment & Planning Component - 2



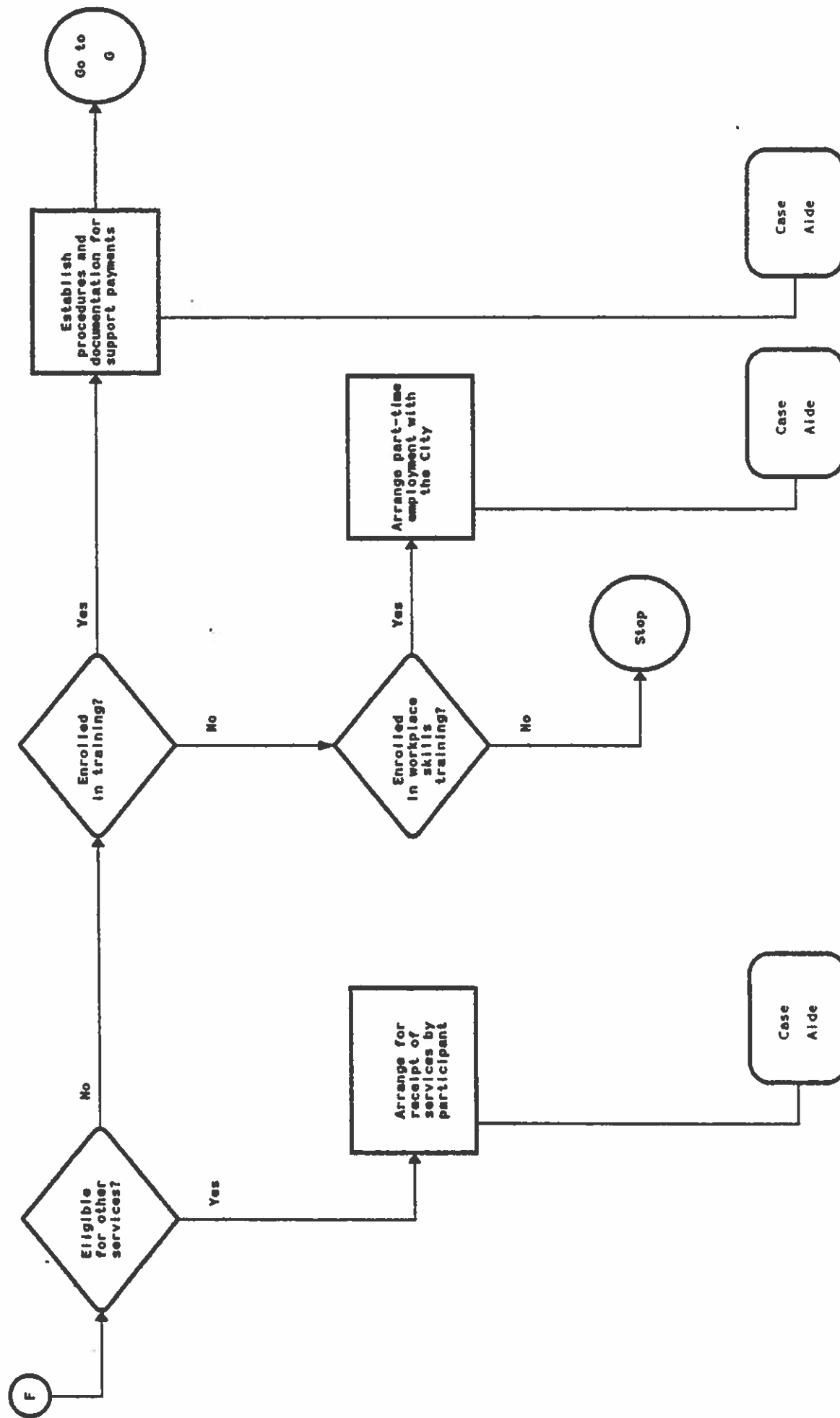
-
- Develop profile of basic skills competency in reading and math. Identify key values, aspirations and life circumstances.
 - Develop profile of work-related "likes" and "dislikes." Evaluate assessment results in relation to objectives.
 - Develop measure of occupational aptitude. Evaluate workplace skills and behaviors.
 - Assess potential for success.

Employability Assessment & Planning Component - 3



-
- | | | |
|--|---|--|
| <p>Occupational selection.</p> <p>Identify required skills and behavior development.</p> <p>Identify support/maintenance needs.</p> <p>Prepare individual counseling objectives.</p> | <p>Prepare training plan and budget.</p> <p>Establish needs-based payment and support services account.</p> <p>Assign to group counseling team.</p> <p>Assign to Case Aide.</p> | <p>Establish start date and provider for training included on training plan.</p> |
|--|---|--|

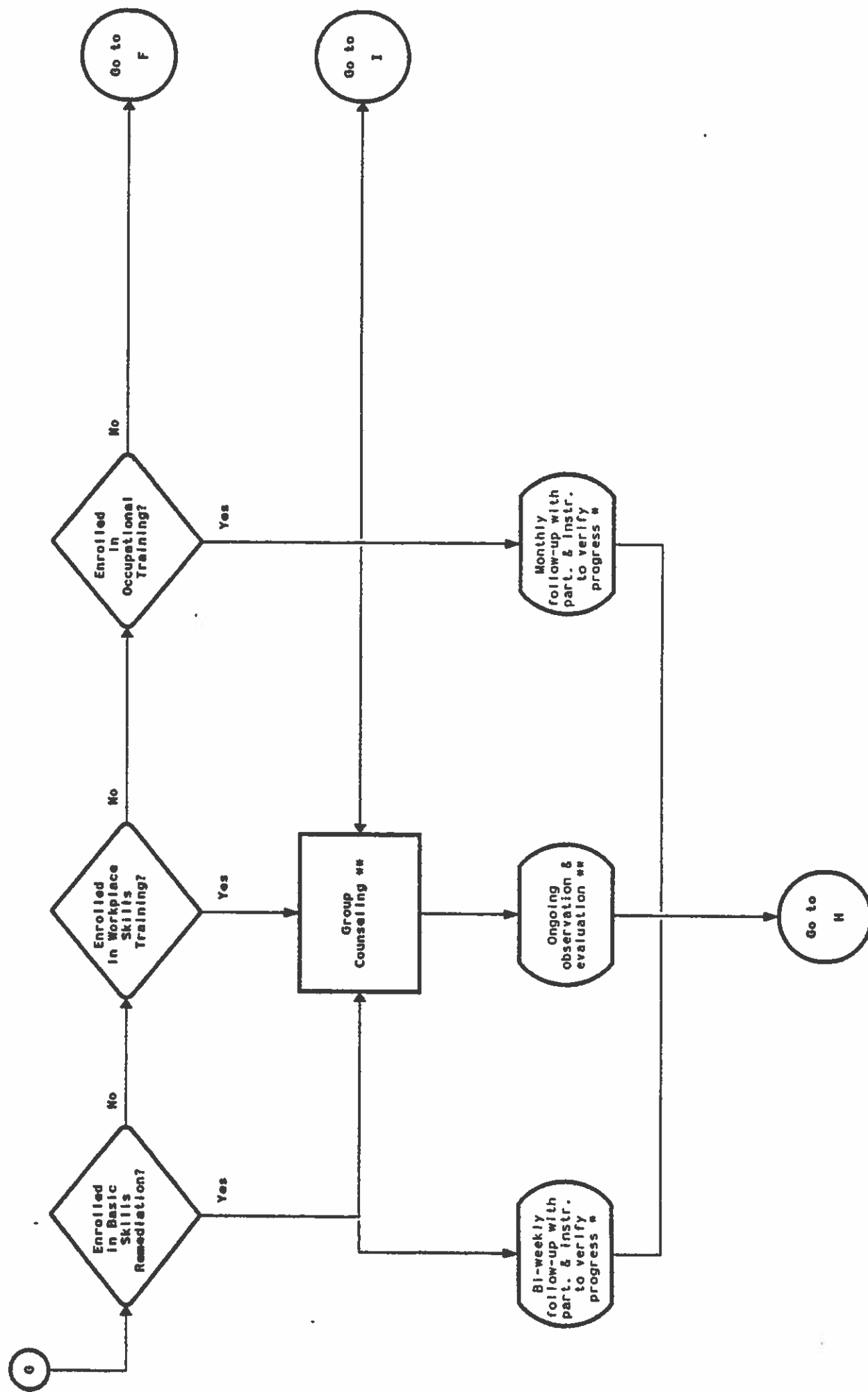
Participant Maintenance Component



Enter participant authorization for payment into system.

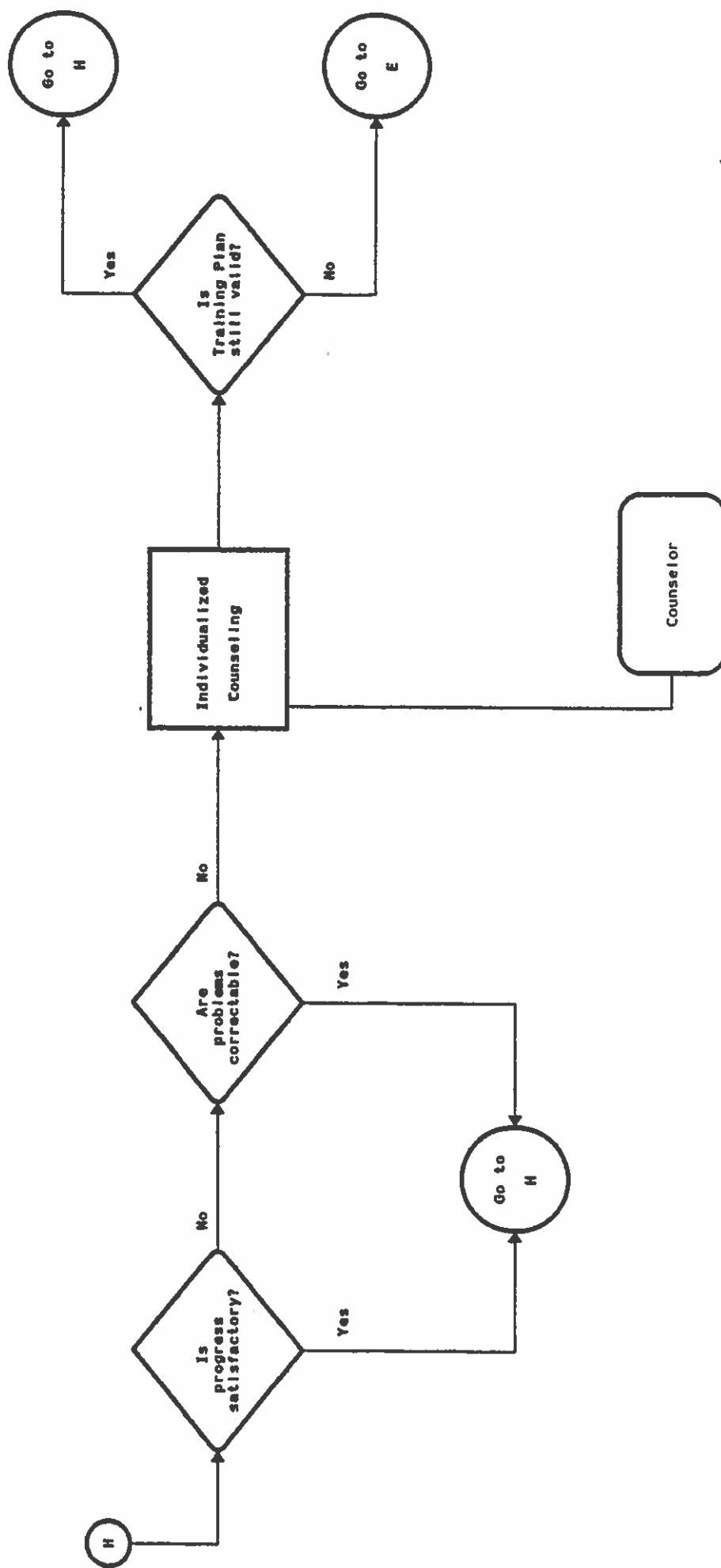
Develop participant and instructor understanding of timesheet requirements.

Employability Development Component

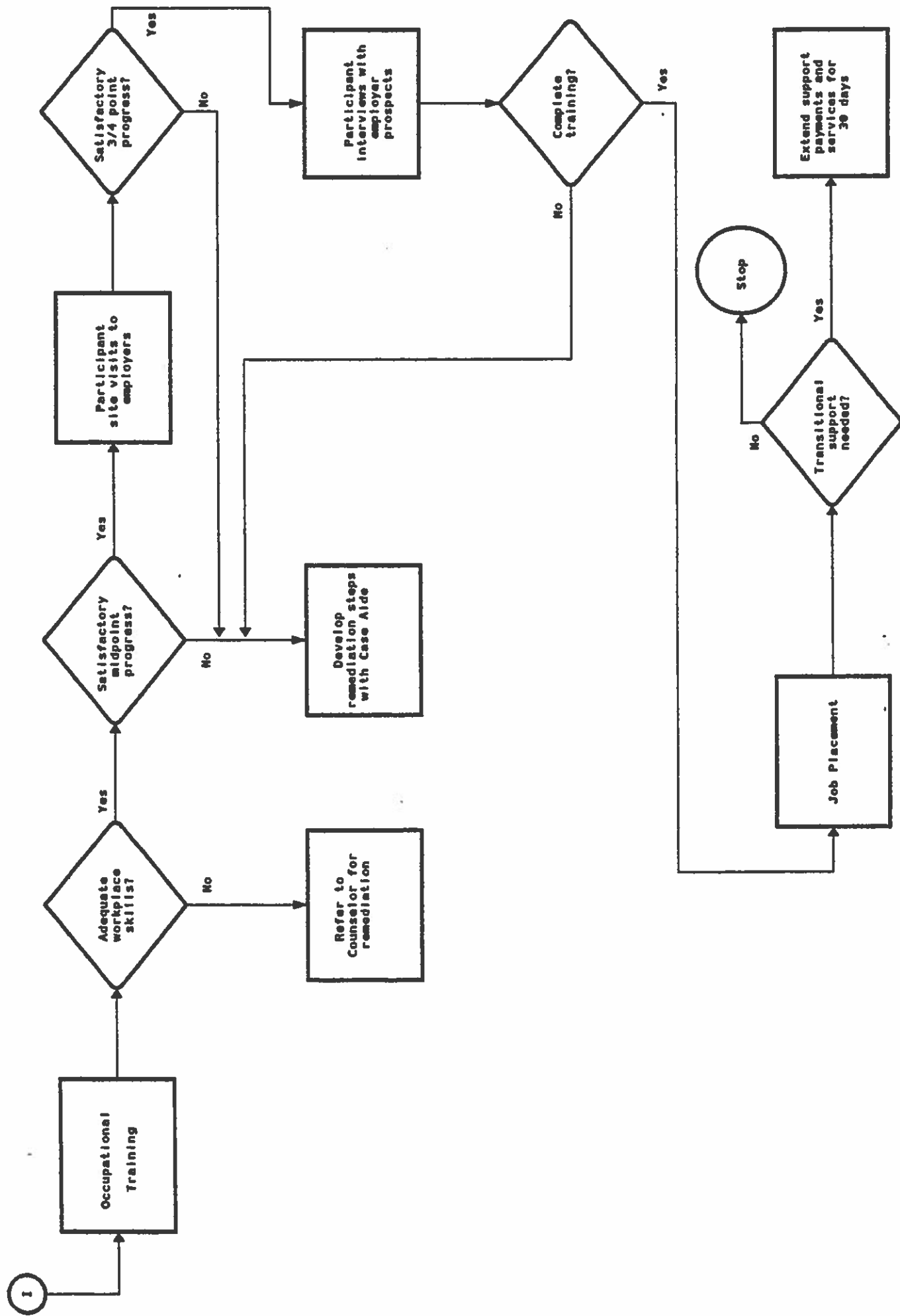


* Case Aide
** Counselor

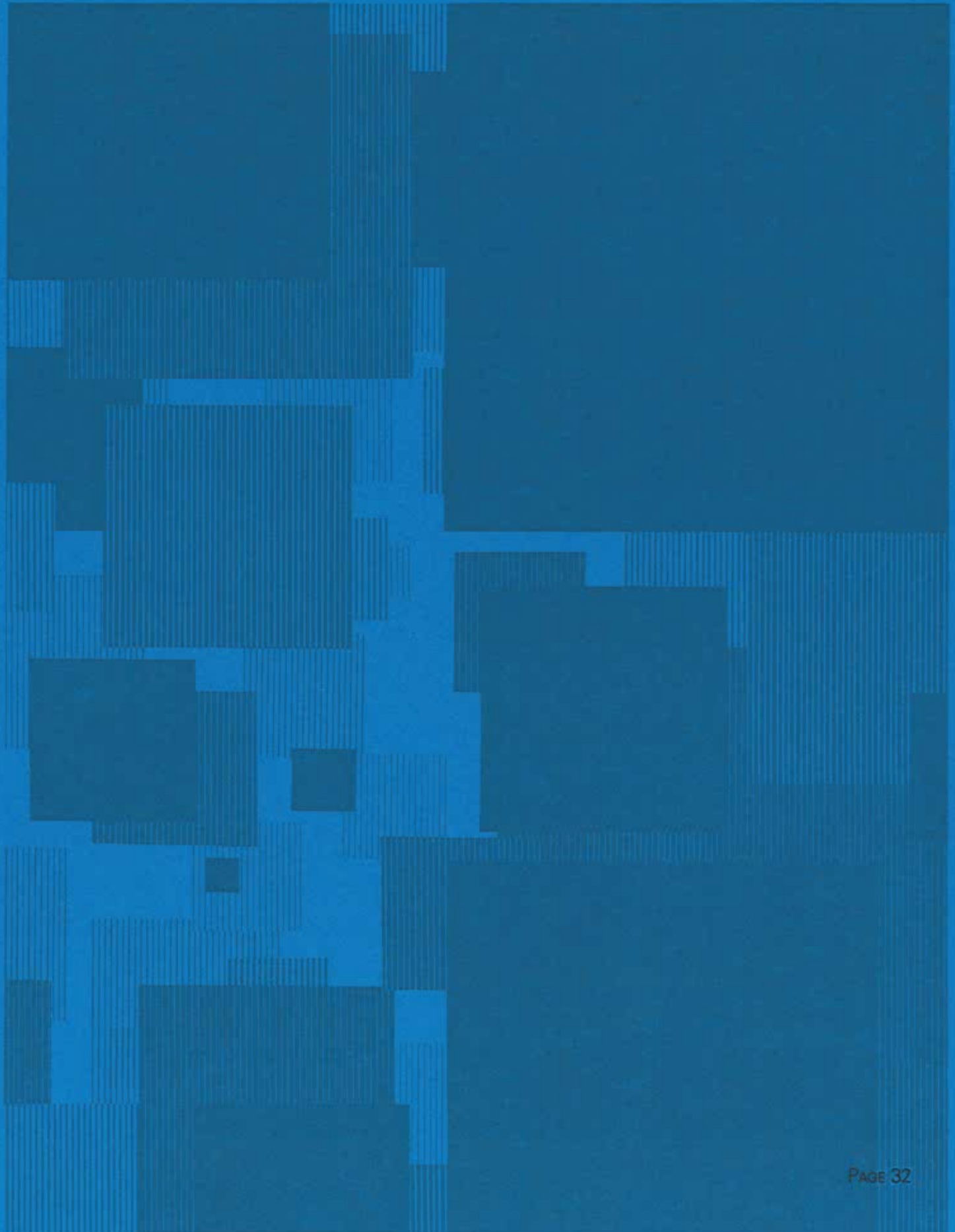
Employability Development Component - 2



Job Training & Placement Component



Component Descriptions



JOB DEVELOPMENT COMPONENT

SERVICE COMPONENT: Job Development

MAJOR ELEMENTS

- Identify and target shortage occupations for training and placement
- Identify and recruit employers for participation in the project
- Develop job performance standards and core competencies for each occupation
- Review/develop and certify curriculum and training providers

RESOURCES AND RESPONSIBILITIES

(1) *Identify and Target Occupations*

* San Antonio Labor Market Information System (SALMIS)

SALMIS will provide statistical information and analysis on employment supply-demand trends and projections on the local labor market which will be used by project staff to identify expanding industries and occupations that are appropriate training and placement targets for this project.

* COPS/Metro Alliance

Representatives of these community organizations will continue to meet with larger employers in the community for the purpose of identifying their needs for workers and targeting additional occupations for training.

(2) *Identify and Recruit Employers*

* COPS/Metro Alliance

Representatives of these community organizations will meet with employers in the local labor market who hire in the targeted occupations. The purpose of these contacts will be to obtain information on the quality of jobs and working conditions and to solicit employer commitments to actively participate in the project.

* Occupational Skills Specialist

This is the key project staff position providing support to this component. The Occupational Skills Specialist will contact targeted employers for the purpose of soliciting their commitment to participate in the project. Once a commitment is made, the Specialist will work

with supervisors and staff of the employer to develop complete and accurate skills profiles of the employer's hiring and job performance requirements for the targeted positions. The OS Specialist will also be responsible for identifying with the employer planned hiring schedules for the target occupations so that participant intake and training schedules can be effectively linked to the employer's planned timetable for hiring.

(3) ***Develop Skills/Competencies Profiles***

* **Occupational Skills Specialist**

This staff position will provide the lead technical capability for working with employers and with curriculum specialists from area training institutions to translate job responsibilities and performance requirements into a set of core knowledge, skills and behaviors required for effective job performance and success. Skills/competencies profiles will be developed for each targeted occupation. Though the profiles will be developed from information provided by individual participating employers, they will be generalized to the common requirements of all participating employers. Profiles will be developed using a competency-based approach.

* **Occupational Advisory Committee**

There will be one Occupational Advisory Committee for each targeted occupation. This committee will be the mechanism for developing a core set of performance requirements and competencies for each occupation, using the information generated by the Occupational Skills Specialist and the background knowledge and experience of the committee members. The committee membership will be comprised of supervisors of workers in the target occupation (one supervisor from each participating employer); curriculum development specialists (one or two) from area institutions providing training in the target occupation; and representatives from COPS/Metro Alliance. The Committee will also provide the means for continually verifying and updating hiring schedules and needs with the participating employers. This information should be verified by the Committee on a quarterly basis.

(4) ***Certify Training Curriculum and Providers***

* **Occupational Advisory Committee**

After the competencies/skills profile of the target occupation has been developed, the Occupational Advisory Committee will solicit curriculum-based proposals to provide training in accordance with the profile specifications. The committee will review available curricula for

responsiveness, appropriateness to the established profile, and overall quality of the training provided. If appropriate curricula are already available, the committee will certify all providers with appropriate curricula as legitimate sources for training referrals under this project. If appropriate curricula are not available, the committee will work with area institutions which have closely-related curricula to make the necessary refinements.

OPERATING SPECIFICATIONS

(1) *Functions and Structure of the Occupational Advisory Committee*

An Occupational Advisory Committee will be organized for each target occupation for which training will be provided through the project.

Purpose/Functions

- * Develop the job performance standards and minimum knowledge, skills and behavior competencies required for the target occupation;
- * Continually verify the linkage between current training activities and employer needs in terms of number of participants being trained in the occupation and planned completion dates and hiring schedules;
- * For occupations in which there is not currently a formalized, appropriate curriculum:
 - define the specifications for the curriculum development activity -
- i.e., the specific knowledge, skills, behaviors; critical instructional methods and/or equipment; teacher qualifications -- which must be achieved;
 - solicit and review proposed curricula from area providers;
 - certify provider(s) and curricula which successfully respond to the curriculum specifications.
- * For occupations in which formalized, appropriate training programs exist in the local area:
 - review the competencies and performance measurement standards reflected in the curriculum to determine their appropriateness and responsiveness to the identified competencies and standards for the occupation;

- verify that the training sufficiently addresses general skills to promote the trainee's future mobility as well as immediate job placement prospects;
- review and approve the curriculum and provider(s) for the purposes of training referral through the project.

Membership Structure

- * Supervisors of workers in the occupation from participating employers (one supervisor from each firm);
- * Curriculum development specialists from area training institutions (one or two);
- * Representatives from COPS/Metro Alliance (one or two).

(2) *Criteria for Target Occupations and Employers*

- * Clearly identified labor shortages that are not due to poor working conditions (i.e., as reflected in consistently high turnover rates);
- * Wage level no lower than \$7.00 per hour, exclusive of fringe benefits;
- * All positions must include a family health plan coverage fringe benefit;
- * Skills proficiencies requiring a minimum of 9 months of classroom-based training;
- * Clearly identifiable opportunities for upward mobility.

(3) *Criteria for Curricula/Training Providers*

The following criteria are to be used to guide the Occupational Advisory Committees in developing and certifying only the highest quality training programs for use in the demonstration.

- * Curriculum must address all core competencies; competencies must be relevant to, but not limited to, the requirements of individual employers;
- * Curriculum must provide adequate opportunities for practice and demonstration of skills and behaviors;
- * Curriculum must utilize materials and equipment that are relevant to current employer work practices and environments;

- * Curriculum must reflect the principles of effective adult learning and must use techniques of experiential learning;
- * Curriculum must be competency-based (including methods for measuring competency attainment in objective terms).
- * Providers must have a maximum class size of 25 and/or participant:instructor ratio of 15:1.

(4) ***Examples of Training Programs/Facilities Acceptable for Funding***

- ▶ Certificate-based classroom training provided through an approved post-secondary training institution (e.g., community college, nursing school) designed to qualify the trainee for entry-level hiring requirements in the occupation, and which has been approved by the Occupational Advisory Committee for the occupation.
- ▶ Competency-based training provided through a "training center" which has been newly established by a consortium of employers who are participating in the project. The training must be conducted in a classroom/workshop format and shall address common job performance elements vs. elements that are unique to an individual employer.
- ▶ Employer-approved training that includes a mix of classroom instruction through an approved training institution and employer-provided worksite training.

[NOTE: Training can not be that which is provided by employers to regular employees. Training must be directed at meeting the entry-level hiring requirements of employers.]

(5) ***Responsibilities and Qualifications of the Occupational Skills Specialist***

The Occupational Skills Specialist will be an employee of the demonstration project. (S)he should be hired at the beginning of the operational planning phase of the project.

Responsibilities

- * Provide task analysis and job redesign assistance to develop entry-level job performance and hiring requirements in targeted occupations;
- * Solicit employer participation in the project, and identify shortages in other occupations with those employers which are participating;

- * Identify other employers with shortages in the target occupation(s) and solicit their participation in the project;
- * Using SALMIS and other available information, identify labor shortages in the other occupations in the local labor market;
- * Provide direct staff support to one or more Occupational Advisory Committees to effectively carry-out their assigned functions;
- * Provide detailed information about the target occupations to staff and clients in the participant intake and employability assessment and planning components of the project -- specifically, state-of-the-art work samples, videos and descriptive literature highlighting the working conditions, requirements and culture of the occupation and area employers in the occupation;
- * Meet regularly with project staff -- intake specialists, counselors, case managers -- to share information.

Qualifications

- * Bachelor's degree in economics, management or closely-related field;
- * At least two years of private sector work experience in task analysis and job redesign; or, in lieu of the experience, completion of formal training in task analysis and job restructuring;
- * Experience in gathering and using labor market information -- formal and informal -- to identify and analyze expanding industries and occupations;
- * Familiarity with the principles of competency-based training and with the techniques/approaches of competency-based training curricula development;
- * Good communications and interpersonal skills, and the ability to work in a group environment to accomplish objectives;
- * High energy with an inquisitive mind, and a research and analysis orientation.

PARTICIPANT INTAKE COMPONENT

SERVICE COMPONENT: Participant Intake

MAJOR ELEMENTS

- Outreach and recruitment of potential participants
- Pre-screening of applicants to verify their interest in the project and commitment and ability to meet the requirements for successful participation
- Initial orientation to the program and its opportunities and requirements
- Program application and determination of eligibility for the project and other available services and programs
- Referral, as appropriate, to other services and programs

RESOURCES AND RESPONSIBILITIES

(1) *Outreach and Recruitment*

*** COPS/Metro Alliance Community Network**

Target neighborhoods will be identified and outreach/recruitment will occur through the distribution of public information and through the facilities and members of the COPS/Metro Alliance network. This demonstration will not be operated on a city-wide basis. General information flyers and pamphlets describing the project will be developed and disseminated through the COPS/Metro Alliance network and community centers in the target neighborhoods. Information provided will include:

- a general description of the program and the occupations in which training is being provided;
- program eligibility and the groups which have been targeted for special consideration for enrollment;
- a list of contact persons, phone numbers and locations for arranging a pre-screening appointment.

(2) *Orientation and Pre-Screening*

*** Community Screening Teams**

Three-member Community Screening Teams will be organized in each targeted neighborhood for the purpose of pre-screening interested

applicants in terms of a willingness and ability to make a strong commitment to participate in and complete a long-term education and job training program. The Community Screening Teams will be trained in interviewing skills and supported by project staff in terms of program information, eligibility requirements, and other available programs and services.

The Community Screening Team will conduct a meeting/interview with each prospective applicant to:

- provide a general orientation to the purpose of the program, the target occupations, and participation requirements;
- communicate the eligibility requirements, including the target groups identified for priority consideration;
- explicitly communicate the community's expectations and commitment to those participating, and to clarify the responsibilities of those selected to participate;
- assess the prospective applicant's likelihood of success in the program;
- make a referral of appropriate applicants to the Intake/Assessment Center;
- provide information on available programs/services to applicants not selected for program participation.

These interviews will be scheduled and conducted in appropriate, convenient community/neighborhood facilities. For those applicants being referred to the Intake/Assessment Center, the Community Screening Team will provide the applicant with a Program Application Form, which the applicant should complete prior to going to the Intake/Assessment Center. The Application Form will specify the documentation which must be provided by the applicant to establish eligibility.

[NOTE: The Community Screening Teams will not be responsible for eligibility determination or for making any final determinations on who will be accepted into the program. Their purpose is to make a determination of legitimate interest and appropriateness given the target group criteria which have been established.]

(3) *Application and Eligibility Determination*

* Intake Specialist

The Intake Specialist at the Intake/Assessment Center will be responsible for assisting the applicant, as needed, in completing the Application Form and understanding the type of documentation needed for eligibility determination. As part of this process, the Intake Specialist will be making an assessment of the applicant's ability to effectively complete an application and to follow instructions.

The Intake Specialist will enter the applicant's information into a centralized program eligibility system and receive a print-out of the programs/services for which the applicant is eligible. If the applicant is eligible for the program, the Intake Specialist will schedule him/her for the next Program Orientation session. The Intake Specialist will enter on the Application Form all additional available services for which the applicant is eligible. The Intake Specialist will retain one copy of the Application Form and provide one copy to the applicant.

If the applicant is not eligible but is interested in other programs/services for which (s)he is eligible, the Intake Specialist will complete a Referral Form for those programs/services and provide it to the applicant.

* Computer-Assisted Eligibility Determination System

A computer-based eligibility determination system will be developed to determine an applicant's eligibility for services funded through the project as well as an array of other education, job training and supportive services available in the community (including the City's JTPA program). Through a standardized Referral Form, as many services as possible will be arranged for eligible applicants without sending them through another intake process.

OPERATING SPECIFICATIONS

(1) *Eligibility and Targeting Criteria*

Eligibility

Young adults with a high school diploma or GED, and who have two of the following barriers to employment:

- ▶ economically disadvantaged
- ▶ reading or math skills below the 9th grade level
- ▶ limited English speaking ability

- ▶ no prior work history within the last two years in which they remained on a job for longer than six months
- ▶ no prior work history or vocational training in one of the target occupations
- ▶ teen parent
- ▶ handicapped
- ▶ offender
- ▶ displaced homemaker

Target Groups for Special Consideration

- Applicants who have a working life expectancy of at least twenty-five years
- Parents with dependent children less than seven years of age [NOTE: Only one parent will be allowed to participate.]

(2) *Responsibilities and Qualifications of the Intake Specialist*

The Intake Specialist will be an employee of the demonstration project. In addition to intake and eligibility determination, the Intake Specialist will be responsible for conducting weekly group orientation sessions and overseeing applicants during the Career/Occupation Exploration Activity (see the description of the Employability Assessment and Planning Component).

Responsibilities

- * Provide detailed information on the project, its services and the individualized approach to service-delivery;
- * Verify the completeness of the Application Form and the documentation required for eligibility and, as needed, assist the applicant in completing the Application and in obtaining the required eligibility documentation;
- * Enter information into the computer-based eligibility system and review with the applicant the programs and services for which the applicant is eligible;
- * Evaluate the applicant's appearance, ability to complete the Application and follow instructions, punctuality and interviewing skills;
- * Assist the applicant in determining the programs/services which are most appropriate for the applicant's needs and circumstances;

- * Schedule the applicant for the Program Orientation and/or complete appropriate Referral Form(s) for programs/services for which the applicant is eligible.

Qualifications

- * Thorough knowledge of the eligibility requirements for the project and all other programs/services included in the eligibility data base;
- * Good communications and interviewing skills;
- * Experience in and/or connectedness with the neighborhood(s) served by the Intake/Assessment Center;
- * Basic familiarity with computers, including the ability to enter information and execute basic commands associated with eligibility determination.

EMPLOYABILITY ASSESSMENT AND PLANNING COMPONENT

SERVICE COMPONENT: Employability Assessment and Planning

MAJOR ELEMENTS

- Group orientation to program
- Individual career/occupation exploration
- Standardized testing of skills, interest, and aptitude
- Identification of individual goals, interests and circumstances
- Employability development planning
- Program enrollment or referral

RESOURCES AND RESPONSIBILITIES

(1) *Program Orientation*

*** Intake Specialist**

The Intake Specialist will conduct a weekly group orientation to the program. The orientation will consist of a slide/video-based 2-hour presentation and Q&A discussion for a maximum of 20 applicants. The orientation will address the program structure, occupations and employment opportunities (including participating employers), job performance requirements/employer expectations, and participant responsibilities in the program.

*** Orientation Information Packet**

Each applicant will receive an Orientation Information Packet describing program components, staff positions and responsibilities, participant service process, participant responsibilities (including participation in group counseling), job performance behaviors, and available support services and maintenance assistance.

(2) *Career/Occupation Exploration*

*** Intake Specialist/Career Exploration Center**

Each Intake/Assessment Center will include a Career Exploration Center which will include work samples, videotapes, descriptive literature and other reference materials (e.g., Occupational Outlook Handbook) for the target occupations which can be accessed and used by applicants on a

self-paced basis. Applicants will have two days to review information in the Career Exploration Center and/or other materials, including contacts with area employers, and make a selection of occupational interest. Applicants will be required to complete an "Occupational Selection" worksheet prior to their scheduled session with the Counselor. The worksheet will identify the occupation in which the applicant is most interested and will include some information, completed by the applicant, on why the applicant is interested in the occupation and why the applicant feels that (s)he can benefit from participating in the project. In addition, each applicant will be required to complete an Income and Expense Statement summarizing types and amounts of monthly expenses and sources and amounts of monthly income.

The standard activities of the Career Exploration Center will be supplemented by presentations by staff of participating employers and by site visits to participating employers.

The Intake Specialist and Intake/Assessment Center Manager will oversee the Career Exploration Center activities.

At the conclusion of the Career Exploration, each applicant will be asked to verify their interest in the program. Each interested applicant will be scheduled for the standardized assessment and Counselor interview. If an applicant is no longer interested in the program, but is interested in and eligible for other programs/services, the Intake Specialist will complete the appropriate Referral Form(s).

(3) *Comprehensive Testing*

* Intake/Assessment Center Manager

The Intake/Assessment Center Manager will supervise the administration of a 6-hour testing battery of basic skills functioning levels, vocational/work-related interests, and aptitudes. The battery will be administered over a 2-day period to avoid testing "burnout." The Intake Specialist will assist the Intake/Assessment Center Manager in administering the test battery and in preparing a summary of test results for each applicant.

At the conclusion of the testing, the applicant will be assigned to a Counselor, who will be the permanently assigned Counselor if the applicant is enrolled in the program; and an Applicant Record is sent to the Counselor. The Record will include the Application Form, a Workplace Skills Rating which has been completed by the Intake Specialist on each applicant based on observed behaviors during activities to date, and the test results summary.

* Testing Battery

The specific testing instruments to be used will be determined during the operational planning phase of the project, but should be comparable to the following in terms of comprehensiveness:

- Basic Skills: Test of Adult Basic Education (TABE); ASSET
- Vocational Interests: Strong-Campbell Interest Inventory; Wide Range Interest Opinion Test; Career Occupational Preference (COP-R)
- Vocational Aptitude: Career Ability Placement Survey (CAPS); APTICOM; GATB

In addition to the standard generic tests, additional aptitude tests which are used by participating employers and/or training institutions in a target occupation can be incorporated into the testing process for those applicants interested in the occupation.

(4) *Employability Assessment Interview*

* Counselor

The Counselor will conduct a 1:1 interview with the applicant to explore the "what's and why's" of the applicant's values, goals, occupational interests, and life circumstances. For the purposes of this interview, the Counselor will have the information in the Applicant Record, and the Occupational Selection Worksheet and Income and Expense Statement completed by the applicant.

Using the above information, the Counselor and applicant will jointly determine if the applicant can be effectively served by the project and whether one of the target occupations is an appropriate employment target for the applicant. The Counselor will also review the applicant's financial situation to determine that, even with program maintenance assistance, the applicant will be able to effectively support themselves during program participation. If yes, the Counselor will proceed to preparation of the Employability Development Plan. If no, the Counselor will use the previously collected eligibility information to determine other appropriate assistance for the applicant and will complete the Referral Form(s).

(5) ***Employability Development Planning***

* **Counselor**

Employability development planning will use all of the prior information which has been collected on the applicant. The Plan will include identification of the occupational target for training and placement and, if appropriate, a target employer; and identification of required development objectives in basic skills and workplace skills; and an identification of supportive services to be provided to facilitate participation in the program. Specific supportive services needs will be determined by a review of the applicant's life situation, current sources of income, and types of current expenses and the additional types of expenses needed for active participation in the program. The EDP will also incorporate individualized counseling objectives for the applicant, as appropriate, to address personal barriers/issues that are not likely to be covered in group counseling or training activities.

Completion of and concurrence with the EDP is the joint responsibility of the applicant and the Counselor. Development of the EDP should be a negotiation in which both the Counselor and the applicant are active participants.

Completion of the EDP and execution through the signature of both the Counselor and the applicant will constitute program enrollment and trigger completion of the Enrollment Form by the Counselor who will initiate a Participant File incorporating the EDP with the information included in the Applicant Record. At this point, the Counselor will assign the participant to a Case Aide. As with the Counselor, the Case Aide will be permanently assigned for the duration of the participant's involvement with the project.

(6) ***Participant Enrollment***

* **Case Aide**

The Case Aide will take the completed EDP and work with the Training and Supportive Services Resource Brokers to identify available "slots" and schedule the applicant for entry into training and/or receipt of needed supportive services.

* **Counselor/Case Aide**

Using the information provided by the Resource Brokers, the Counselor and Case Aide will establish an individual training and service account for the participant. The Account will reflect tuition and materials costs for

training in which the participant has been scheduled, the costs of supportive services, and a maintenance budget required to sustain the participant during the scheduled training. The Counselor and Case Aide will meet with the participant and review the structure of the Account and how the participant will access supportive services and maintenance payments; and the schedule and location of training and counseling activities.

OPERATING SPECIFICATIONS

(1) *Responsibilities and Qualifications of the Counselor*

The Counselor will be an employee of the demonstration project. In addition to activities in this component, the Counselor will have lead responsibility for the counseling activities described in the Employability Development Component. The Counselor will be expected to carry an active caseload of 35-40 participants.

Responsibilities

- * Conduct a structured individual interview with program applicants for the purpose of identifying needs and the appropriateness of the project to the applicant's situation;
- * Interpret testing and interview information to determine best plan of assistance for the applicant; the Counselor will be responsible for the enrollment decision;
- * Prepare, jointly with the applicant, an Employability Development Plan;
- * Design and conduct/facilitate group and individualized counseling sessions with participants that can accomplish developmental objectives which have been established and/or to resolve problems which emerge during participation.

Qualifications

- * Demonstrated ability to establish rapport with young adults, and in being able to confront participants on poor attitudes/behaviors and achieve adjustments;
- * Demonstrated ability to be "open but honest," and "fair and sensitive but tough" in interactions with others;
- * Ability to interpret results from standardized testing instruments;

- * Demonstrated ability to conduct empathetic but probing interviews;
- * Experience/connection with target neighborhoods;
- * Bachelor's degree required, Master's preferred, in social work, psychology, education or closely-related discipline;
- * Three years experience as counselor in social programs, with additional years substituting for formal education;
- * Certification as a Licensed Professional Counselor or Advanced Clinical Practitioner by the State of Texas.

(2) ***Responsibilities and Qualifications of the Case Aide***

The Case Aide will be an employee of the demonstration project. The Case Aide will be expected to carry an active caseload of 70-80 participants.

Responsibilities

- * Continually remain in contact with participant and instructors during the program; during basic skills remediation, contact will minimally be on a bi-weekly basis; during occupational skills training, contact will minimally be on a monthly basis;
- * Through discussions with participant and instructor, determine if participant is making satisfactory progress;
- * Assist participant in resolving minor issues/conflicts that are inhibiting participation and progress;
- * As needed, work with Resource Brokers to identify and access other services needed by the participant;
- * Provide monthly feedback to Counselor on participant progress and any emerging needs or problems;
- * As appropriate and directed by the Counselor, assist Counselor in accomplished individual developmental objectives for the participant;
- * Evaluate the quality of the instruction, facilities and course content of the training offerings in which participants are placed; and provide feedback to the Education and Training Resources Broker and to the Occupational Skills Specialists for use by the Occupational Advisory Committee. [NOTE: The Case Aide will be required to physically visit each facility at which one his/her participants is assigned on a quarterly

basis for the purpose of observing the facility and materials and eliciting feedback from the participant(s).]

Qualifications

- * Demonstrated ability to communicate and work well with young adults;
- * Demonstrated ability to manage multiple tasks and complete them on a timely basis in a dynamic work environment;
- * Bachelor's degree preferred and at least two years of relevant work experience in employment and training or human service organizations, with each additional year of work experience substituting for academic training.

(3) *Responsibilities and Qualifications of the Resource Brokers*

The Resource Brokers -- one for training and education services, one for supportive services -- will be employees of the demonstration project. They should be hired during the operational planning phase in order to begin developing relationships and an information base on the offerings, schedules, capacity and costs of area providers.

Responsibilities

- * Develop profiles and maintain a data base on the capabilities, service capacity, location and costs of as broad a range of qualified providers in the City as possible;
- * Develop and maintain effective working relationships - formal and informal - with the staff of service providers for the purpose of being able to gain priority access to training/service slots, as needed;
- * In response to the requirements of Employability Development Plans, as presented by the Case Aide, contact providers and negotiate access to training/service slots.
- * Provide information on training programs and institutions to the Occupational Skills Specialists in support of curriculum evaluation work of the Occupational Advisory Committees;
- * Provide general information on services and providers to the Community Screening Teams for use in making referrals for those not meeting the entry requirements for the demonstration project.

Qualifications: Education and Training Resources Broker

- * Bachelor's degree required, Master's preferred, in education, social work, psychology or a closely-related discipline;
- * Two years work experience in education or human service programs with additional years of relevant work experience substituting for formal education;
- * Good working knowledge of adult education and post-secondary educational institutions and their program/course offerings in the San Antonio area;
- * Demonstrated selling and negotiating skills.

Qualifications: Support Service Resources Broker

- * High school completion or equivalent with some post-secondary training required, Bachelor's degree preferred;
- * At least two years experience in working in health, human service, employment and training or related social service programs in San Antonio, with additional years of relevant work experience substituting for formal education;
- * Extensive knowledge of the social services network in San Antonio, particularly in those neighborhoods targeted for the project;
- * Demonstrated negotiating skills.

(4) *Responsibilities and Qualifications of the Intake/Assessment Center Manager*

One of the Counselors at each Intake/Assessment Center will serve as the Center Manager.

Responsibilities

- * Supervise all activities of the Center, maintaining the standards of quality and effective service which are defined for each component;
- * Direct administration of the comprehensive testing battery;
- * Plan and oversee the activities of the Career Exploration Center;

In addition to managing the Center, this Counselor will provide a "backup capability" for handling excessive counseling caseloads.

Qualifications

- * Must minimally satisfy qualifications of the Counselor as specified earlier in this component description;
- * Experience in, and certification if required, administering the tests included in the comprehensive testing battery;
- * Minimum of two years experience in a supervisory position in a social service organization.

PARTICIPANT MAINTENANCE COMPONENT

SERVICE COMPONENT: Participant Maintenance

MAJOR ELEMENTS

- Arrange for support services for which participant is eligible
- Provide income support while awaiting enrollment in occupational training
- Provide income support during occupational training

RESOURCES AND RESPONSIBILITIES

(1) *Arrange for Receipt of Support Services*

*** Support Service Resource Broker and Case Aide**

For participants who were determined through the intake and eligibility process to be eligible for other services (e.g., child care, transportation assistance, training grants, specialized counseling) available in the local area, the Support Service Broker will contact the appropriate agency(ies)/staff to determine the availability of slots or assistance. Once availability and access has been identified by the Resource Broker, the Case Aide will help the participant complete the required procedures to begin receiving the service or assistance.

Through the centralized intake and eligibility process, it is a major objective of this project to help participants access as broad a range of assistance for which they qualify as possible.

(2) *Provide Income Support while Awaiting Training*

*** City of San Antonio**

The City of San Antonio has committed to providing part-time employment in its recreation and libraries departments for participants who can not immediately begin occupational training and/or are in need of part-time employment while they are enrolled in training, if the work schedule does not conflict with the class schedule.

*** Project Grant Funds**

The positions available from the City will be supplemented by JTPA grant funds which will be used to create limit work experience positions within the City and with nonprofit organizations in the area.

* Case Aide

The Case Aide will be the project staff responsible for working with the City Personnel Department and with the Department of Community Initiatives to arrange these part-time jobs for those participants who need them.

(3) *Provide Income Support during Training*

* City of San Antonio

The City has committed to provide income assistance, from its general revenue fund, to participants who can not remain in training without such assistance. The Counselor will be responsible for determining the amount of income support to be provided to a participant by evaluating his/her expense and income situation and the additional costs required to participate in training.

* Project Grant Resources

Grant funds (i.e., Wagner-Peyser and JTPA) will be used to provide needs-based payments and limited work experience opportunities for those participants needing income support during their training. Opportunities for part-time employment with target employers during training will also be explored, but the primary focus during the training period will continue to be training vs. employment.

* Case Aide

The Case Aide will be responsible for working with the Support Service Resources Broker to identify sources and resources for providing needed supportive services to the participant. Wherever possible, these services will be funded through other program resources (e.g., health, child care, housing, unemployment insurance). However, the primary criteria is that each participant receives the assistance they need to effectively participate in the program. As needed, the participant will receive payments from the City to cover the costs of these services from providers in the community.

The Case Aide will be responsible for coordinating with the City fiscal department to establish the documentation for timely receipt of authorized payments by the participant.

OPERATING SPECIFICATIONS

(1) *Amount of Income Support*

Each participant will qualify for an income supplement, including supportive services assistance, such that their family income will be equal to 100% of the lower living income standard for the San Antonio area.

(2) *Timeliness of Income Support Payments*

Procedures shall ensure that payments to participants are made on a bi-weekly basis and not later than one week after required documentation for payment is received.

(3) NATURE OF THE INCOME SUPPORT SYSTEM

Income support policies and procedures will satisfy the following criteria:

- ▶ A locally developed and approved (i.e., by the Policy Steering Committee) formula will be used to determine the amount of support assistance to be provided to individual participants;
- ▶ All support payments will be determined by documented needs of the individual participant;
- ▶ The circumstances of individual participants will be periodically reassessed and adjustments, as appropriate, to support payment amounts will be made.

EMPLOYABILITY DEVELOPMENT COMPONENT

SERVICE COMPONENT: Employability Development

MAJOR ELEMENTS

- Basic skills remediation
- Workplace skills training
- Group counseling
- Individualized counseling

RESOURCES AND RESPONSIBILITIES

(1) *Basic Skills Remediation*

The purpose of basic skills remediation, given that all participants will be high school graduates or GED recipients, is to develop the functioning levels, including English reading and verbal communication skills, required for entry and successful performance in the occupational skills training which has been selected by the participant.

* Counselor

As part of the employability assessment, the Counselor will review the standardized testing results and determine if the participant is functioning at the grade level needed to meet the entry standards of the occupational training which has been selected. If no, the Counselor will include on the EDP some basic skills remediation to be provided on an open entry, open exit basis through one of the City's literacy centers or other basic skills programs.

* Case Aide

The Case Aide will arrange through the Training Resources Broker a slot in an appropriate basic skills training facility. Once enrolled, the Case Aide will follow-up with the participant and the instructor on a bi-weekly basis to verify the rate of progress. If progress is not satisfactory, the Case Aide will determine jointly with the participant and the instructor whether satisfactory progress can be achieved without any external assistance or action, If no, the Case Aide will schedule an individualized counseling session with the Counselor for the participant.

[NOTE: For the purposes of this demonstration, no applicant will be accepted for enrollment who requires more than two months of basic skills remediation prior to entry into occupational training.]

(2) ***Workplace Skills Training***

The purpose of workplace skills training is to develop those skills and behaviors required for long-term success in the labor market, given the fact that all workers will change jobs, and sometimes careers, several times during their work life. Workplace skills training will be conducted through the group counseling sessions led by the Counselor.

* Counselor

The Counselor will be responsible for supervising Workplace Skills Training for participants. Self-paced instructional materials will be used for this training; participants will be responsible for completing research and exercises included in the material. Group counseling sessions, led by the Counselor, will be used to review exercises and to reinforce and practice skills such as interviewing, interpersonal communications and interactions, and teamwork.

* Case Aide/Training Instructor

Training instructors at the facilities/institutions at which a participant is assigned will be required to complete Work Maturity Rating Sheets on participants bi-weekly to measure their demonstration of good workplace behaviors. The results of these ratings will be reviewed by the Case Aide, who will provide feedback both to the participant and to the Counselor.

(3) ***Group Counseling***

The purpose of group counseling, a required activity for all participants, is to develop the skills, attitudes and behaviors needed for individual self-sufficiency. These are the traits needed for general survival and success in life, no matter what career direction is taken. Group counseling will provide the opportunity for participants to develop and practice individual responsibility, self-esteem, and teamwork skills.

Group counseling will occur through a 2-hour weeknight session, conducted weekly. Participants will be required to participate in these sessions throughout their first year in the program; participation after the first year is at the option of the participant and the Counselor. It is expected that each counseling group will encompass a mix of participant profiles in terms of experience in the program and individual circumstances and needs. Thus, participants will be able to learn from their peers, as well as from the Counselor and, thus, provide the opportunity for the development of peer mentoring relationships.

* Counselor

The Counselor will be responsible for forming the counseling groups, and designing and facilitating the counseling sessions. During the sessions, the Counselor will make continuous observations of the behavior and skills demonstrated by individual participants and will determine the need for more individualized counseling interventions.

(4) *Individual Counseling*

The purpose of individual counseling is to address personal barriers and circumstances of the participant that inhibit successful participation in the program or attainment of the longer-term employment and self-sufficiency goals which have been established in the EDP. These sessions will be the mechanism through which the Counselor addresses the objectives set in the Individual Participant Counseling Plan.

* Counselor

The Counselor has the lead responsibility for all individual counseling.

OPERATING SPECIFICATIONS

(1) *Content of Workplace Skills Training*

The design of the Workplace Skills Training activities must address the following skills/behaviors/competencies: completion of a job application; preparation of a resume; job interviewing; punctuality and attendance; effective communication and listening; interpersonal interactions; accepting responsibility and task completion; problem-solving; working in groups/teams; and job search.

(2) *Content of Group Counseling*

The design of the Group Counseling activities must address the following skills/behaviors/competencies: social interactions; accepting responsibility; self-esteem; leadership; the value of work; the value of relationships; personal financial management and budgeting; coping with change.

TRAINING AND PLACEMENT COMPONENT

SERVICE COMPONENT: **Job Training and Placement**

MAJOR ELEMENTS

- Occupational skills training
- Employer contact and interviewing
- Job placement
- Post-placement transitional assistance

RESOURCES AND RESPONSIBILITIES

(1) *Occupational Skills Training*

*** Training Institution/Provider**

Each training institution/provider at which a participant is enrolled will provide quality training in accordance with the curriculum and training and competency assessment standards which have been approved and certified by the applicable Occupational Advisory Committee. Training instructors will be expected to complete, on a bi-weekly basis, a Work Maturity Rating sheet on each participant and, as needed, to review the ratings with the participant and the Case Aide. Training instructors will also maintain time and attendance sheets on each participant and submit them to the Case Aide bi-weekly.

*** Case Aide**

During occupational skills training, the Case Aide will contact the participant and the instructor monthly to review progress. On a quarterly basis, the Case Aide will physically visit the training facility to observe the facilities and training process for adherence to quality training standards which have been defined by the project. If satisfactory progress is not being made or if there are indications that the quality of the training is not meeting the standards which have been established, the Case Aide will meet with the participant and, if needed the instructor, to assess the reasons. If the Case Aide determines that the participant is not adequately prepared to successfully complete the training or if other barriers are being experienced that significantly inhibit participation, the Case Aide will schedule a session with the Counselor to review and validate the EDP.

If issues of training quality can not be quickly resolved with the Instructor, the Case Aide will refer his/her findings to the Counselor, who

will then meet with the appropriate Occupational Skills Specialist and, if necessary, the Instructor to determine corrective actions which need to be taken. If the quality issue can not be resolved in an amicable and timely manner at this level, the issue will be referred to the Project Director.

(2) ***Employer Contact and Interviewing***

* **Counselor**

If the participant is maintaining satisfactory progress in both employability skills and occupational skills development at the midpoint of training, the Counselor will assist the participant in scheduling site visits and interviews to participating employers who hire in the participant's occupation. The purpose of these contacts is to further orient the participant to the work environments and cultures of participating employers and to begin building individual relationships between the participant and the staff of prospective employers. This process can begin earlier in the training program, but assuming satisfactory progress by the participant, should begin no later than the midpoint of the training.

* **Prospective Employers**

Many of the participating employers will want to begin contacts with their future job applicants earlier than the training midpoint and even to establish mentoring relationships with individual participants. While such early contact will be encouraged, it will be balanced with the objective of giving participants and their prospective employers the broadest possible exposure so that the best possible "matches" can be made.

(3) ***Job Placement***

* **Counselor**

The Counselor will be ultimately responsible for job placement of the participants in his/her caseload. However, the project is designed so that the participant - employer connection will happen naturally as a result of the project design and interactions which have occurred prior to training completion.

(4) ***Post-placement Transitional Assistance***

* **Counselor**

After job placement, some participants may need continuation of their

income maintenance and support services for some period before pay checks are received and the participant achieves a stable financial position. The Counselor will be responsible for evaluating these needs; for reassessing the eligibility of the participant for post-placement supportive services and helping the participant access those services for which they continue to be or are now eligible; and for authorizing continuation of all or part of the project funded maintenance support received by the participant during training.

OPERATING SPECIFICATIONS

(1) *Acceptable Occupational Training Facilities*

The majority of occupational skills training will occur in the classroom-based and workshop facilities of certified training institutions. In some cases, occupational training may be established and conducted in employer workplace settings. However, workplace training must be supported by an established, competency-based training curriculum and must include training methodologies that address generalized occupational vs. employer-specific skills and incorporate more than supervisor direction and feedback (e.g., the OJT model). See the Job Development Component for a description of the criteria for fundable training models.

(2) *Acquisition of Training Services*

All training for which payment will be made to a training vendor or institution must be procured through a competitive process. Since most, if not all, training will be on an individual referral basis, a training voucher method shall be used to obtain training services for individual participants. Under this approach, the principles of a competitive process shall be assured through the following steps:

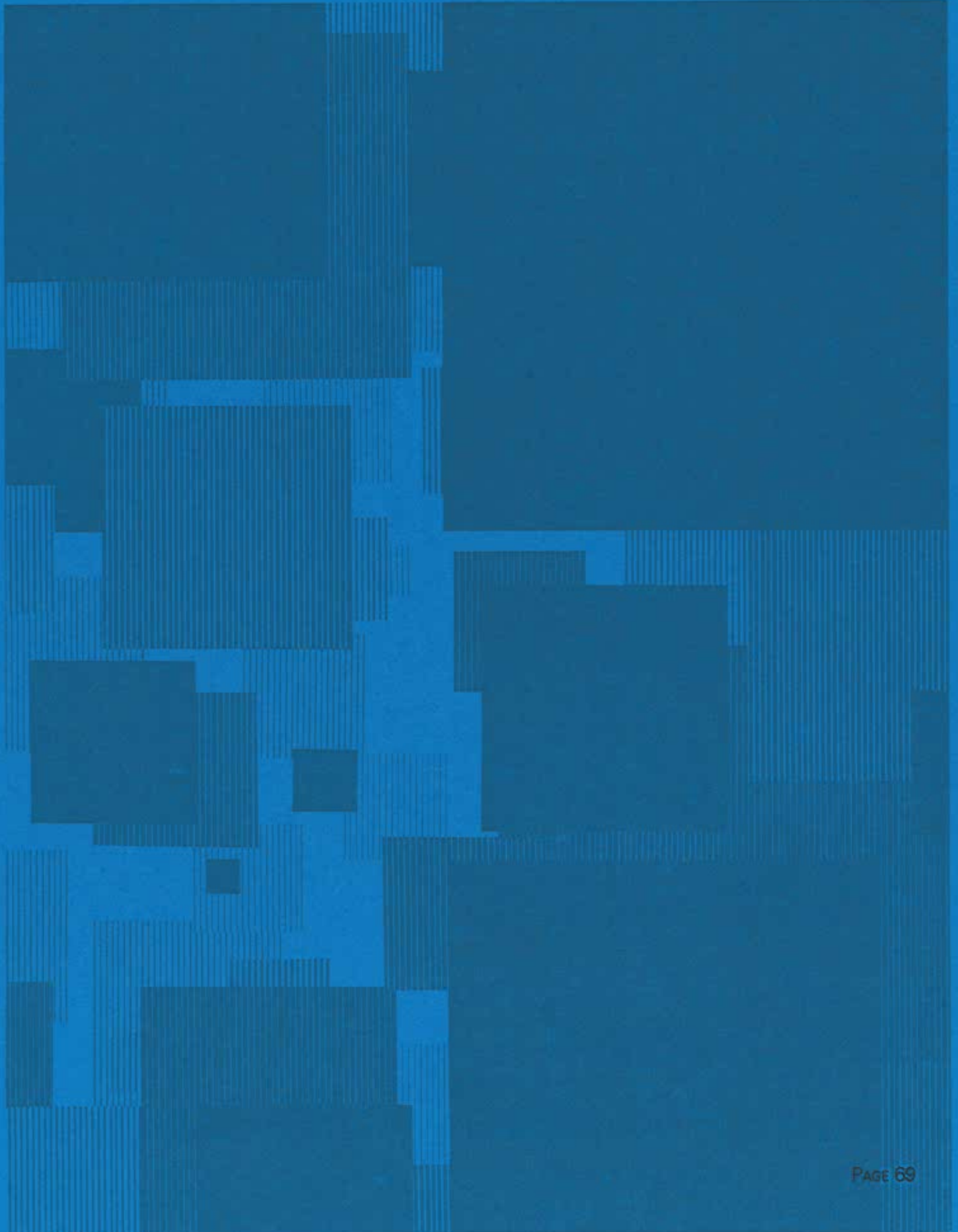
- ▶ Each Occupational Advisory Committee will develop a set of competency and quality specifications for its occupation. Once a year, the specifications will be publicly advertised and statements of capabilities and unit costs solicited.
- ▶ Received statements will be evaluated by the Committee for responsiveness to the specifications and cost reasonableness and a set of certified training providers in the occupation will be established for the year. These providers will be authorized sources for referral throughout the year as long as their capacity to satisfy the specifications and adhere to the cost estimate remains intact. Training institutions which have been previously certified, and have provided training which satisfied the content and quality standards of the project, will only have to submit updated information (i.e., costs, curriculum refinements) for re-certification.

- ▶ The requirements for sole source procurement will be followed where a Training Center is being newly established by a consortium of employers for the purpose of meeting a need for workers and there is no existing or satisfactory training institution for meeting the need in the San Antonio area.

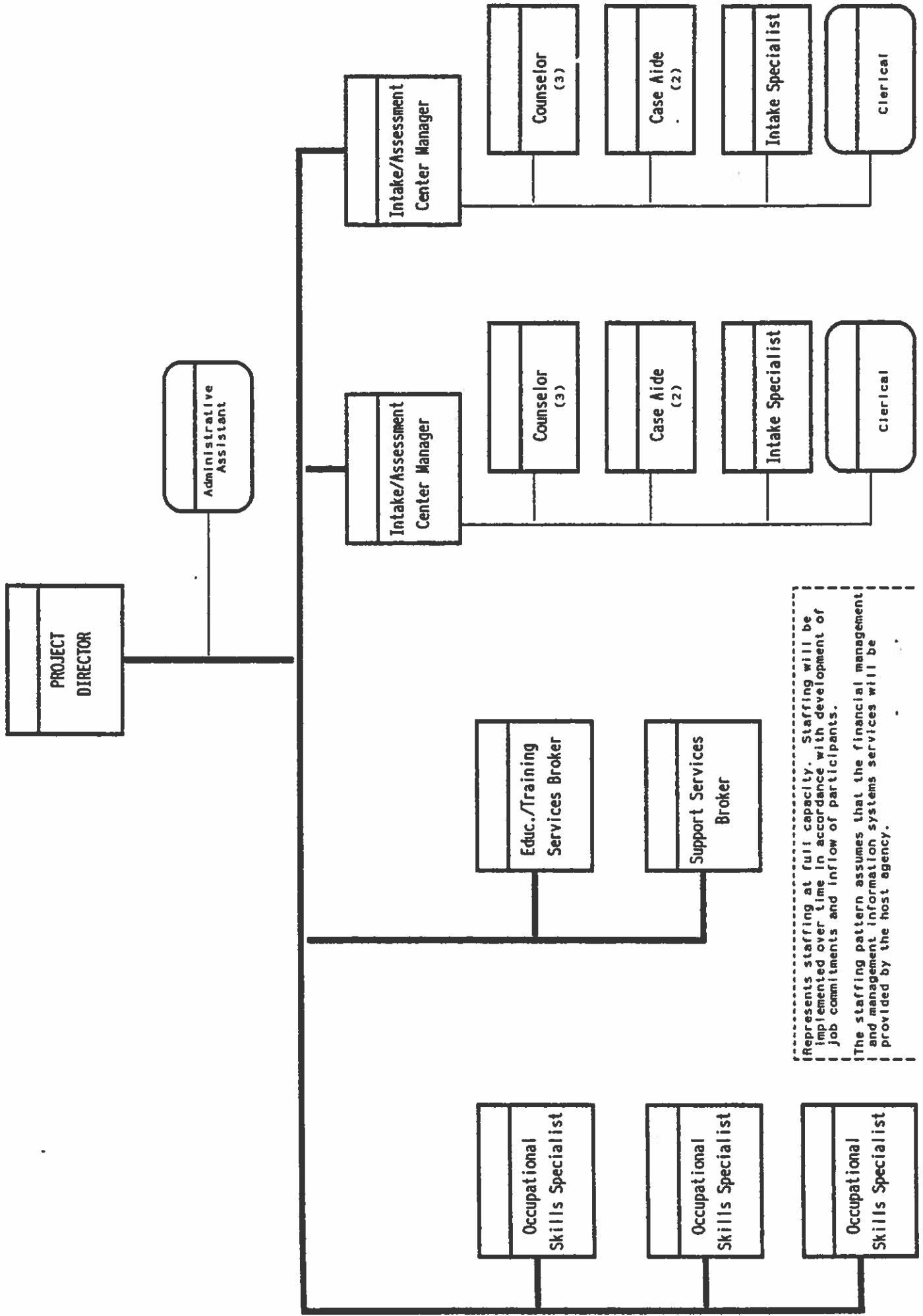
(3) ***Post-placement Transitional Assistance***

The provision of support services will be in accordance with the regulations governing the agency and resources through which the services are made available to the participant. For services and support provided through the resources of this project, this assistance can be continued for a maximum of 30 calendar days after the participant begins employment.

Organization Structure



Project Organization Chart



Represents staffing at full capacity. Staffing will be implemented over time in accordance with development of job commitments and inflow of participants.

The staffing pattern assumes that the financial management and management information systems services will be provided by the host agency.

Operational Planning Decisions

OPERATIONAL PLANNING DECISIONS/ACTIONS

OVERALL

- Solidify funding commitments for the project:
 - ▶ Verify and validate that the City's general fund commitment of \$2 million is budgeted, clearly identified and available for the life of the demonstration (July 1, 1992 - June 30, 1994);
 - ▶ Develop and submit an application to the Texas Employment Commission to secure the State's \$2.5 million commitment to the project;
 - ▶ Develop necessary documents to guarantee the \$2 million commitment from the City's JTPA funds.
- Obtain the City ordinances necessary to authorize and support operational planning for the project, specifically the authority to hire the project director and fund a small staff to carry-out the operational planning steps for the project.
- Clarify the roles of the key partners in the project -- the San Antonio Works Board; the City, as the administrative entity for JTPA; and the project operator.
- Develop the specifications for the core management systems (i.e., financial management, participant tracking and performance reporting) for the project.
- Recruit and hire a Project Director by May 1, 1992.
- Develop and issue a Request-for-Proposal to solicit an independent entity to operate the project; and select the operating entity by June 1, 1992.
- Identify and secure temporary facilities -- space, furniture, equipment, supplies - for the Project Director and planning staff.
- Evaluate the project design to ensure compliance with applicable provisions of the Americans with Disabilities Act.

JOB DEVELOPMENT COMPONENT

- Develop job descriptions, recruit and hire two Occupational Skills Specialists by May 1, 1992.

JOB DEVELOPMENT COMPONENT (cont.)

- Verify the firms, contact points and nature of commitments made by employers as a result of the COPS/Metro and City efforts to identify specific jobs and shortage occupations.
- Establish immediate target occupations for project start-up -- i.e., those with formal training programs already in place in the local area.
- Coordinate priority positions with the City's customized training initiatives under JTPA to avoid duplication of efforts and confusion by local employers.
- Develop general guidelines for the formation and operation of Occupational Advisory Groups.
- Organize and provide orientation for the Occupational Advisory Groups in the targeted occupations.
- Develop profiles, standards, and core competencies for each of the occupations.
- Refine criteria for competitively selecting and certifying the training institutions.
- Collect and review curricula of area institutions offering training in the occupations targeted for project start-up.
- Make contacts with the major providers of local labor market information -- SALMIS, the Texas Employment Commission, and the region's Quality Workforce Planning Group.
- Develop hiring, training and intake schedules for the targeted occupations.

PARTICIPANT INTAKE COMPONENT

- Consider using the "10 percent window" in JTPA funds to cover the training costs of project participants who are not JTPA eligible.
- Identify the neighborhoods to be targeted for the project.
- Identify project staff position to be responsible for supporting community-based outreach and pre-screening activities; recruit and hire staff for the position.
- Establish the number and location of pre-screening points in the targeted neighborhoods.

PARTICIPANT INTAKE COMPONENT (cont.)

- **Develop a detailed orientation information packet on project services, staff resources, participant rights and responsibilities, grievance procedures and expected benefits of program participation.**
- **Develop format and materials (e.g., slide/video presentation) for the group orientation sessions.**
- **Develop and pre-test the forms necessary to support the application, eligibility determination and referral processes.**

EMPLOYABILITY ASSESSMENT AND PLANNING COMPONENT

- **Recruit, hire and train the two Resource Brokers.**
- **Develop the data base on available education and support services and providers which will be accessible to applicants and participants. This data base must be developed before the intake process begins.**
- **Evaluate and select the testing instruments to be included in the comprehensive testing battery, particularly aptitude tests which are relevant to the priority target occupations.**
- **Develop the format and support materials for the Career Exploration Centers to be located at each Intake/Assessment Center.**
- **Collect work samples and develop other methods/materials to facilitate the participant's exposure to the work culture of the targeted occupations.**
- **Recruit, hire and train Counselors and Case Aides. Should begin with two Counselors, including the Center Manager, and one Case Aide at each Intake/Assessment Center and expand as necessary to accommodate the participant flow.**
- **Develop the necessary forms to support the activities in this component: the Employability Development Plan, including the Individual Training Account; the Occupational Selection Worksheet; the Income and Expenses Form; the Workplace Skills Rating Form; and the Program Enrollment Form.**

PARTICIPANT MAINTENANCE COMPONENT

- Earmark and verify commitment of City resources to provide direct income support (not part-time jobs) for participants.
- Obtain approval from TEC to use Wagner-Peyser 7(b) funds to provide income support to participants.
- Develop specifications for income support system that meets the requirements for "needs-based payments" under the Job Training Partnership Act.
- Develop linkages and negotiate required agreements needed to establish an effective network of support service providers which can be accessed by the project.
- Develop procedures and establish responsibilities for maintaining records and processing income support and other support services payments in a timely manner.

EMPLOYABILITY DEVELOPMENT

- Review and evaluate basic education programs in the San Antonio area to identify those quality programs offering basic skills remediation through an open-entry, open-exit service model.
- Establish a process for competitively selecting those education programs/institutions to be certified for referrals of participants to basic skills remediation.
- Design/select a curriculum and develop materials for workplace skills training.
- Design an approach to group counseling that encourages individual responsibility, developing self-esteem and building effective peer mentoring relationships.
- Develop form(s) required to assess participant behavior in relation to workplace skills performance requirements.

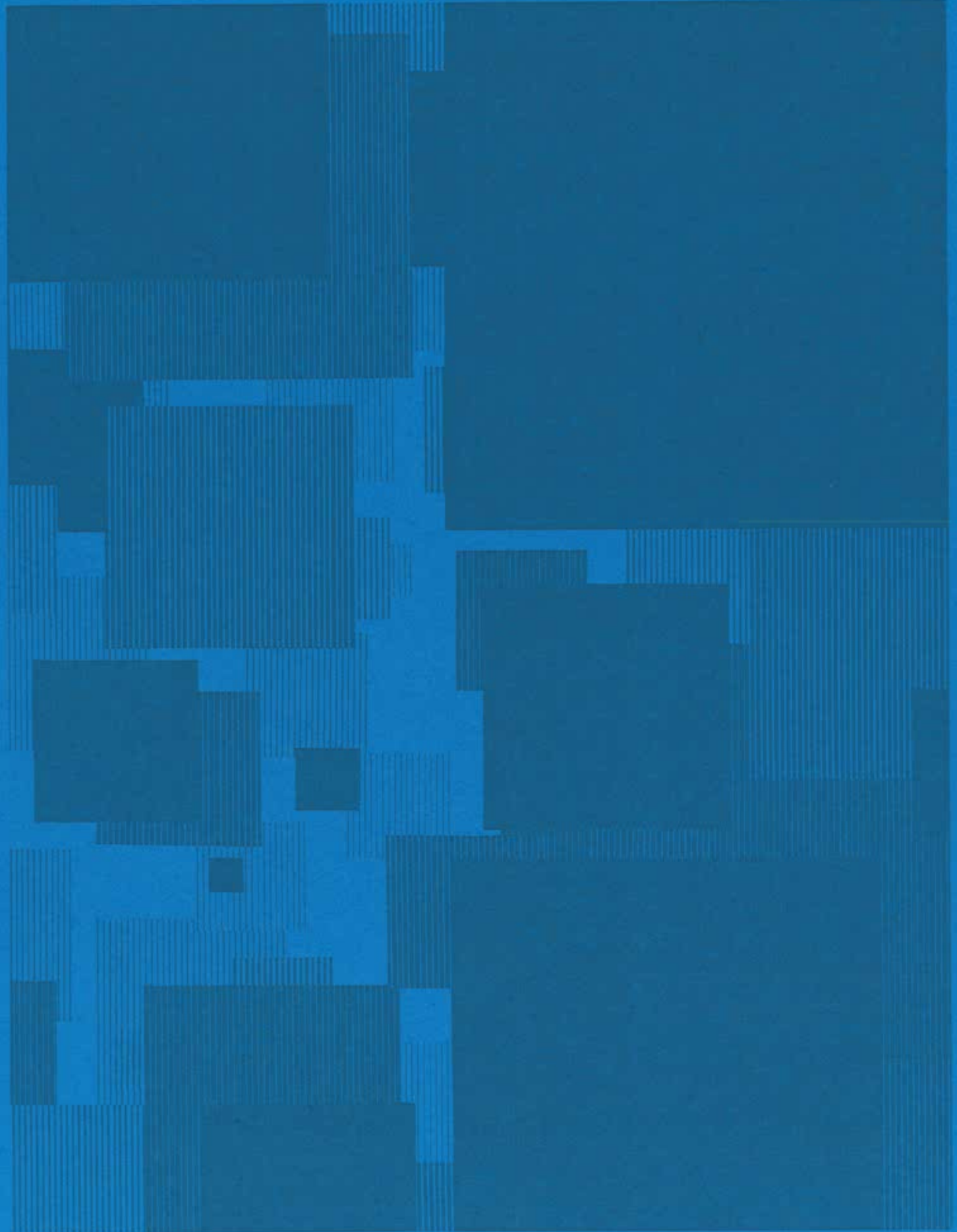
JOB TRAINING AND PLACEMENT COMPONENT

- Explore the mentoring programs at USAA as a basis for establishing an employer-based mentoring program in the early stages of the occupational skills training component, allowing future employees to meet and establish relationships with potential employers.
- Develop a process, including a standard RFP, for competitively selecting training programs/institutions to be certified for referrals to occupational training.

JOB TRAINING AND PLACEMENT COMPONENT (cont.)

- Design appropriate forms, specifically the Work Maturity Rating Sheet and the Time and Attendance sheets to be used by the training institutions.

Appendices



***Appendix A:* PROJECT EXECUTIVE DIRECTOR JOB DESCRIPTION**

Executive Director
Job Training Demonstration Project

Title: Executive Director, Job Training Demonstration Project

Salary: \$55,000 to \$65,000, with benefits

Supervision Received and Exercised:

Receives policy direction from the Policy Steering Committee, a subcommittee of the San Antonio Education Partnership, or its successor, with approval from the City of San Antonio.

Provides leadership and management supervision for all project staff.

Desired Qualifications:

Knowledge of:

- The personnel, staff training and development practices of private sector organizations.
- Techniques for managing programs with multiple objectives operating in complex public environments where voluntary cooperation is essential for success.
- The development and operation of federal and state education, job training and employment, and human services programs.
- Federal, state and local laws, regulations and guidelines governing the design and operation of employment and training programs.

Demonstrated Ability to:

- Provide the innovative leadership, sense of vision and direction needed for this demonstration project.
- Plan and design innovative approaches to providing job training services that involve new roles for business, government and community organizations in San Antonio.
- Work effectively with the key actors in the San Antonio community, including the community organizations that created the demonstration, the private sector, the elected officials, city staff and representatives of the various funding sources.
- Effectively manage people to accomplish project objectives.
- Communicate clearly both verbally and in writing.
- Secure the funding commitments necessary to replicate the demonstration.

Experience and Training:

- A bachelor's degree in Business Administration, Public Administration, Economics, Urban Studies, or a closely-related discipline; related higher education a plus.
- At least five years of hands-on experience in training programs in either the private or public sector, with experience in key management positions.
- Demonstrated initiative in developing and implementing complex projects.
- Successful experience with planning, budgeting and managing large-scale programs with multiple funding sources preferred.

Duties and Responsibilities:

- Duties and responsibilities may include, but are not limited to the following:
- Recruiting, hiring and managing the staff necessary to carry out the stated goals of this demonstration.
- Directing the operational planning activities required for project start-up.
- Maintaining and expanding the active participation from the San Antonio business community to support the project's job development objectives.
- Developing and expanding the local network of quality education, job training and human service agencies supporting the project.
- Developing an integrated services delivery model that includes a computerized eligibility determination and client tracking system.
- Developing the necessary management controls—the budgeting, cost allocation, accounting and reporting systems—required to satisfy the project's multiple funding sources.
- Overseeing the day-to-day operations of the demonstration.
- Promoting the project with prospective funding sources, external organizations and representatives of federal, state and local government.
- Planning for the replication of the project.
- Monitoring and evaluating the program elements and recommending changes as this project progresses.

Appendix B: **MEMBERSHIP LISTS**

**SAN ANTONIO EDUCATION PARTNERSHIP
GOVERNING BOARD MEMBERS**

MS. GRACIE ACUNA
Board President
Harlandale School District
102 Genevieve
San Antonio, TX 78214
921-4300 Fax: 921-4334

DR. LOUIS AGNESE
President
Incarnate Word College
4301 Broadway
San Antonio, TX 78209
829-3900 Fax: 829-6096

MR. GILBERT ARREDONDO
Board Member
Southside Independent School District
1610 Martinez Losoya Road
San Antonio, TX 78221
626-0600 Fax: 626-0615

DR. THOMAS BROWN
Superintendent
Southside School District
1610 Martinez Losoya Road
San Antonio, TX 78221
626-0600 Fax: 626-0615

DR. RONALD CALGAARD
President
Trinity University
715 Stadium Drive
San Antonio, TX 78212
736-8401 Fax: 736-7696

MR. JUAN CASTILLO
Board President
Edgewood School District
5358 West Commerce St.
San Antonio, TX 78237
433-2361 Fax: 433-9821

DR. MAX CASTILLO
President
San Antonio College
1300 San Pedro Avenue
San Antonio, TX 78284
733-2354 Fax: 733-2204

SAN ANTONIO EDUCATION PARTNERSHIP
GOVERNING BOARD MEMBERS
PAGE TWO

MR. CHARLES CHEEVER, JR.
Senior Chairman
Broadway National Bank
Post Office Box 17001
San Antonio, TX 78286
283-6529 Fax: 283-6530

DR. RICHARD CLIFFORD
Superintendent
Southwest School District
Route 9, Box 20 SAE
San Antonio, TX 78227
622-3487 Fax: 622-5428

MR. T.J. CONNOLLY
Director of Public Affairs
Paragon Cable
415 North Main
San Antonio, Texas 78205
222-9912 Fax: 271-3541

MR. RON DURBON
Superintendent
South San Antonio School District
2514 Sioux
San Antonio, TX 78224
924-8541 Fax: 927-7003

COL. VIC FERRARI
Education Committee Chairman
United Services Automobile Association
9800 Fredericksburg Road
San Antonio, TX 78288
498-0027 Fax: 498-0030

MR. MIKE FRAZIER
Board President
Southwest School District
Route 9, Box 20 SAE
San Antonio, TX 78274
622-3487 Fax: 622-5428

MR. OSCAR HERNANDEZ
Board President
San Antonio Independent School District
141 Lavaca
San Antonio, TX 78210
433-9307

SAN ANTONIO EDUCATION PARTNERSHIP
GOVERNING BOARD MEMBERS
PAGE THREE

MR. GEORGE IRISH
Publisher
San Antonio Light
420 Broadway
San Antonio, TX 78205
271-2862 Fax: 271-2859

DR. YVONNE KATZ
Superintendent
Harlandale School District
102 Genevieve
San Antonio, TX 78214
921-4300 Fax: 921-4334

DR. SAMUEL KIRKPATRICK
President
The University of Texas
at San Antonio
6900 Loop 1604
San Antonio, TX 78249-0601
691-4101 Fax: 691-4655

MR. JOE KRIER
President
Greater San Antonio Chamber
of Commerce
Post Office Box 1628
San Antonio, TX 78296
229-2128 Fax: 229-1600

MR. JOHN LeFLORE
Chairman of the Board
NCNB-San Antonio
Post Office Box 300
San Antonio, TX 78291
270-5282 Fax: 270-5207

MR. ED KELLY
Chairman
Greater San Antonio Chamber
of Commerce
Post Office Box 1628
San Antonio, TX 78296
498-7391

SAN ANTONIO EDUCATION PARTNERSHIP
GOVERNING BOARD MEMBERS
PAGE FOUR

DR. STEPHEN MITCHELL
President
St. Philip's College
2111 Nevada
San Antonio, TX 78203
531-3591 Fax: 531-3590

FR. JOHN MODER
President
St. Mary's University
One Camino Santa Maria
San Antonio, TX 78228
436-3722 Fax: 436-3500

MR. CARLOS MONTEMAYOR
President
Montemayor Y Asociados, Inc.
70 N.E. Loop 410, Ste. 870
San Antonio, Texas 78216-5843
342-1990 Fax: 525-1052

DR. DOLORES MUNOZ
Superintendent
Edgewood School District
5358 West Commerce St.
San Antonio, TX 78237
433-2361 Fax: 433-9821

DR. VICTOR RODRIGUEZ
Superintendent
San Antonio Independent
School District
141 Lavaca
San Antonio, TX 78210
299-5500 Fax: 299-5580

MR. CARL SCHENKEN, JR.
President
Alamo Iron Works
Post Office Box 231
San Antonio, TX 78291
223-6161 Fax: 978-8351

SAN ANTONIO EDUCATION PARTNERSHIP
GOVERNING BOARD MEMBERS
PAGE FIVE

DR. DAVID SEMRAD
Metro Alliance
102 Belknap
San Antonio, TX 78212
733-1441

DR. BYRON SKINNER
President
Palo Alto College
1400 Villaret
San Antonio, TX 78224
921-5000 Fax: 921-5277

SR. ELIZABETH ANNE SUELTFUSS
President
Our Lady of the Lake University
411 Southwest 24th Street
San Antonio, TX 78285
434-6711 Fax: 436-0824

REV. ROSENDO URRABAZO
Executive Committee Member
Citizens Organized for Public Service (COPS)
3019 West French Place
San Antonio, Texas 78228
732-2156

MR. LARRY WALKER
President/Editor/Publisher
Express-News
Post Office Box 2171
San Antonio, TX 78297
225-7411 Fax: 225-8351

MS. MARCIA WELCH
Chairman
Metro Alliance
230 Vargas
San Antonio, TX 78203
733-1441/534-5266

MR. NELSON WOLFF
Mayor
City of San Antonio
Post Office Box 839966
San Antonio, Texas 78283-3966
299-7060 Fax: 270-4077

JOB TRAINING DEMONSTRATION PROJECT
POLICY STEERING COMMITTEE

Mayor Nelson W. Wolff
City of San Antonio
P. O. Box 839966
San Antonio, TX 78283-3966
Tele. #: 299-7060
Fax #: 270-4077

Dr. Henry G. Cisneros
Chairman
Asset Management
205 N. Presa, Bldg. B, #200
San Antonio, TX 78205
Tele. #: 227-8500
Fax #: 227-5245

Mr. Tom Frost
Chairman
Cullen/Frost Bankers, Inc.
Frost National Bank
P. O. Box 1600
San Antonio, TX 78296-1600
Tele. #: 220-4411
Fax #: 220-4152

Ms. Virginia Ramirez
Executive Committee
COPS
602 Urban Loop
San Antonio, TX 78205
Tele. #: 222-2367
Fax #: None

Mr. Charlie Cheever
Senior Chairman
Broadway National Bank
P. O. Box 17001
San Antonio, TX 78286
Tele. #: 283-6529
Fax #: 283-6530

Father Will Wauters
COPS/METRO
P. O. Box 830355
San Antonio, TX 78283-0355
Tele. #: 923-0822
Fax #: None

Mr. Tim Austin
Vice President
Market Operations
Humana, Inc.
8431 Fredericksburg
San Antonio, TX 78229
Tele. #: 617-1026
Fax #: 617-1724

Father Rosendo Urrabazo
President
Mexican American Unity Council
3019 W. French Place
San Antonio, TX 78228
Tele. #: 732-2156
Fax #: None

Mr. Mike De la Garza
Director
Public Affairs
H.E.B. Grocery
P. O. Box 839999
San Antonio, TX 78283-0999
Tele. #: 246-8592
Fax #: 246-8169

Dr. David L. Semrad
United Methodist Campus Ministry
102 Bellnap
San Antonio, TX 78212
Tele. #: 733-1441
Fax #: None

Father Al Jost
COPS/METRO
P. O. Box 830355
San Antonio, TX 78283-0355
Tele. #: 924-4383
Fax #: None

JOB TRAINING DEMONSTRATION PROJECT
TECHNICAL WORK GROUP

Mr. Kevin C. Moriarty
Director
Department of Community Initiatives
City of San Antonio
P. O. Box 839966
San Antonio, TX 78283-3966
Tele. #: 554-7100
Fax #: 554-7638

Father Al Jost
COPS/METRO
P. O. Box 830355
San Antonio, TX 78283-0355
Tele. #: 924-4383
Fax #: None

Father Will Wauters
COPS/METRO
P. O. Box 830355
San Antonio, TX 78283-0355
Tele. #: 923-0822
Fax #: None

Ms. Susan Marshall
State Job Training Coordinating Council
P. O. Box 12728
Austin, TX 78711-2728
Tele. #: (512) 320-9885
Fax #: (512) 320-9875

Ms. Barbara Cigainero
Director
Work Force Development Division
Texas Department of Commerce
P. O. Box 12728
Austin, TX 78711-2728
Tele. #: (512) 472-5059
Fax #: 320-9674

Mr. Bill Grossenbacher
Administrator
Texas Employment Commission
TEC Building
Austin, TX 78778-0001
Tele. #: (512) 463-2222
Fax #: (512) 475-1133
Fax #: (512) 475-1133

Mr. Homer Hayes
Occup. Technical and Continuing Ed.
San Antonio College
1300 San Pedro
San Antonio, TX 78212
Tele. #: 733-2440
Fax #: 733-2338

Mr. David Trejo
Regional Administrator
Texas Department of Human Services
P. O. Box 23990
San Antonio, TX 78223-0990
Tele. #: 337-3271
Fax #: 337-3405

Mr. Silvario Cuellar
Director
Adult Education
ESC Region XX
1314 Hines Avenue
San Antonio, TX 78208
Tele. #: 299-2409
Fax #: 299-2423

Mr. Richard Palacios
Operations Director of Programs
Texas Rehabilitation Commission
5805 Callaghan Rd., #Ste. 311
San Antonio, TX 78228
Tele. #: 680-2091
Fax #: 680-3325

Mr. Carlos J. Contreras
Regional Director
Texas Employment Commission
301 S. Frio, Ste. 480
San Antonio, TX 78207
Tele. #: 228-0200
Fax #: 226-3138

JOB TRAINING DEMONSTRATION PROJECT

CITY SUPPORT STAFF

Leslie Schockner
(Staff Liaison)
Social Services Administrator
Management Control Systems
City of San Antonio
P. O. Box 839966
San Antonio, TX 78283-3966
Tele. #: 554-7192
Fax #: 554-7638

Gregory Bolds
(Integrated System Design)
Planner II
Employment and Training Division
City of San Antonio
P. O. Box 839966
San Antonio, TX 78283-3966
Tele. #: 554-7158
Fax #: 554-7638

Carlene Lowrie
(Comprehensive Case Management)
Program Manager
Management Control Systems
City of San Antonio
P. O. Box 839966
San Antonio, TX 78283-3966
Tele. #: 554-7191
Fax #: 554-7638

Francisco Moncivais
(Assessment)
Employment and Training Officer II
Employment and Training Division
City of San Antonio
P. O. Box 839966
San Antonio, TX 78283-3966
Tele. #: 554-7672
Fax #: 554-7638

Virgil de la Portilla
(MIS/Computer Systems)
Administrative Assistant III
Management Information Systems
City of San Antonio
P. O. Box 839966
San Antonio, TX 78283-3966
Tele. #: 554-7119
Fax #: 554-7638

Drew Officer
(Supportive Services Coordination)
VISTA Volunteer
City of San Antonio
P. O. Box 839966
San Antonio, TX 78283-3966
Tele. #: 554-7197
Fax #: 554-7638

Rosalinda Z. Banda
(Clerical Support)
Administrative Assistant I
Management Control Systems
City of San Antonio
P. O. Box 839966
San Antonio, TX 78283-3966
Tele. #: 554-7108
Fax #: 554-7638

Agnes Holloway
(Clerical Support)
Secretary I
Management Control Systems
City of San Antonio
P. O. Box 839966
San Antonio, TX 78283-3966
Tele. #: 554-7195
Fax #: 554-7638

CONSULTANTS

Bob McPherson
2207 Greenlee Drive
Austin, TX 78703
Tele. #: (512) 476-7933

Brian Deaton
6304 Massachusetts Avenue
Bethesda, MD 20816
Tele. #: (301) 229-8241
Fax #: (703) 237-4165

